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A RECREATION MARKETING STRATEGY FOR THE UTAH NATIONAL FORESTS



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ABSTRACT

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Title: A Recreation Marketing Strategy for the Utah National Forests

Abstract: The specific audiences for this project paper are the Forest Supervisors, Forest Recreation Staff Officers, and District Recreation Staffs in the State of Utah. Forests outside the State should also benefit from the principles that are discussed and proposed in this report.

The objectives of this paper are:

1. To show that serious marketing problems exist for the Utah National Forests.
2. To present overall guiding principles on marketing that must be understood in order to develop an effective marketing strategy.
3. To outline specific ideas and procedures that will implement the marketing strategy for the Utah National Forests.

The National Forests in Utah and the entire country have a definite image problem! What is our image? It certainly is not as a National leader in outdoor recreation opportunities and tourism promotion. One of the best kept secrets is the fact that the 6 Utah National Forests supply twice as many Recreation Visitor Days of use per year than all 13 National Parks and Monuments in the State.

This paper evaluates the Utah National Forests' marketing practices. It emphasizes that marketing is much more than just promoting or advertising National Forest campgrounds and recreation opportunities. Marketing is the entire process of determining expectations and needs of the Forests' citizen-owners and then making it a top priority to deliver what is expected and desired. Once a marketing strategy is in place, contemporary and innovative promotion techniques need to be used to communicate with the target customer audience. The main idea is to market each National Forest as a public service agency and to get "credit" for doing "good." The pay-off should come in increased public and Congressional support for the National Forest mission. In this paper, various marketing alternatives are explored and recommendations are proposed for implementation.

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EXECUTIVE SUMMARY

A RECREATION MARKETING STRATEGY FOR THE UTAH NATIONAL FORESTS

Audience Description

The specific target audiences for this project paper are the Intermountain Region Recreation Staff, and Forest Supervisors, Forest Recreation Staff Officers, and District Recreation Staffs in Utah. Other Forest and Regional Recreation Staffs should benefit from principles and recommendations outlined in this report.

Objectives of This Paper

1. To show that serious marketing problems exist for the Utah National Forests.
2. To present overall guiding principles on marketing that must be understood in order to develop an effective marketing strategy.
3. To outline specific ideas and procedures that will implement the marketing strategy for the Utah National Forests.

Description of the Problem

Forest Service employees recently watched as sections of the Humboldt National Forest were transformed into the country's newest National Park--the Great Basin. At the 1987 Utah Governor's Conference on Tourism, Lorraine Mitzmier, Rocky Mountain Regional Director for the National Park Service, applauded the action as a tremendous boon to tourism and the economies of Utah and Nevada. The large audience, composed mostly of private sector recreation and tourism management people, responded with a hearty round of applause. They implied that with the act of National Park designation, this land was now worth more to the people and the economies of Utah and Nevada. The National Park Service's basic change in land management will be the addition of a visitor center and increased interpretive services. This same story is being played out on National Forests in Oregon and Idaho. Many people in these states believe that the National Forests are just tree farms. They feel that the National Forests are not doing enough for tourism and recreation.

The National Forests in Utah and the entire country have a definite image problem! What is our image? It certainly is not as a National leader in outdoor recreation opportunities and tourism. Few people are aware that the 6 Utah National Forests supply twice as many Recreation Visitor Days (RVD'S) of use per year than the 13 National Parks and Monuments in the state. It is also necessary for the Utah National Forests to provide these visitor days at half the cost per RVD of the National Parks and Monuments, which have greater Congressional support. It's admirable to be efficient managers, but most people agree that the National Park recreation sites are in better condition and provide a wider range of visitor information services than the National Forest system in Utah.

Harris and Love, Inc., marketing firm for the Utah Travel Council, has stimulated a 5-fold increase in out-of-state visitors to Utah through marketing campaigns directed at large urban centers along the West Coast. Almost 95 percent of Harris and Love's promotional material presents scenery and information on the Utah National Parks. When they were asked why the Utah National Forests weren't recognized for their contributions to tourism, their marketing director bluntly replied, "You have no image, the National Parks do!"

This report assesses and evaluates marketing needs of the Utah National Forests. Most of the assumptions and recommendations will also apply to other states in the Intermountain Region and other Regions of the National Forest System. This report points out that marketing is much more than just promoting or advertising National Forest programs and goods. It is the entire process of determining the expectations and needs of the citizen-owners of National Forests. Our top priority should be to deliver what is expected and desired, and then use contemporary and innovative marketing tools to complete the appropriate promotional job. Past Forest Service advertising efforts have concentrated on selling individual programs to the public, such as the Woodsey Owl and Smokey Bear campaigns. Emphasis should be shifted to "marketing the Agency." The idea is to "do good" and then get credit for it. The pay-off comes when we get increased public and Congressional support for the National Forest mission.

Some alternatives explored and recommended are:

1. Enhancing the National Forests' image in the eyes of the public and Congress through the use of interpretive associations, local and state travel councils, and cooperative ventures with other agencies and private businesses.
2. Ensuring that programs are what the public really want instead of what recreation administrators think is best for the public. Example, a service desired by the public is a 1-800 telephone reservation system for reserving campsites. The camper also wants a "Forest Service presence" at the campgrounds with increased information and host capabilities.
3. Ensuring services and products are available when and where people want them. These include showers, play areas, and convenience items such as ice and firewood.
4. Promoting our image, products, and recreation services to appropriate target audiences through the use of selected promotional techniques such as scenic picture books, discovery tours, welcome centers, video productions, telephone directory guides, etc.

CHAPTER I

ISSUES & CONCERNS



The Utah National Forests, like many Forests in other states, have image and funding problems in their recreation resource programs. Many of these problems are directly related to the lack of proper marketing strategies. This report is based on the premise that National Forests can best define their role in outdoor wildland recreation and design a marketing strategy on a state-by-state basis. Each state has an individual tourism and recreation travel promotion effort which would tie in with the efforts of the Forests in that state. To approach a marketing strategy from a National or Regional basis would be difficult because of the lack of personnel and funding at these levels, and because of the uniqueness of each state's National Forests. This would also deny National Forests an opportunity to develop a closer working relationship with influential officials from each state, which is an integral part of a successful marketing strategy.

This marketing strategy by itself does not sufficiently cover the unique marketing features and opportunities represented by each National Forest in Utah. Using alternatives proposed in this report as a conceptual guide, each Forest will need to complete a marketing strategy based on individual strengths and objectives.

The following problems and issues are identified to illustrate the need for a marketing strategy for the Utah National Forests:

1. Do Utah's National Forests provide any tourism benefits to the State?

As part of the Utah State Travel Council's attempt to increase visitors to the state and help boost the economy, they hired a regional marketing firm, Harris and Love, Inc. Harris and Love's goal was to stimulate a 5-fold increase in out-of-state tourism by 1995. Their extensive media campaign is targeted at California, Arizona, and Colorado. Almost 95 percent of their promotional material presents scenery and information on the National Parks in Utah. The material is well done and presents an accurate pictoral view of many scenic wonders and vacation opportunities provided by the 13 National Parks and Monuments in the State. At the 1987 Governor's Conference on Tourism, the marketing director for Harris and Love was asked why the Utah National Forests weren't recognized in promotional material for their contributions to tourism in the State. The director bluntly replied, "You have no recreation and tourism image, the National Parks do!"

2. Are we on the map?

The 1987 Official Utah Highway Map is an excellent opportunity to market the "undiscovered wonders" of the State. The first page of the map is entitled, "UTAH....A Palette of Parks." Over 40 lines of text paint a very vivid image of the classic landscapes and opportunities found in Utah's National Parks. Located at the bottom of the second page is the insertion, "Or you can wander aimlessly in any of Utah's seven National Forests."

3. Are we getting credit?

The State of Utah is divided into local travel councils. Each council is doing an excellent job of marketing attractions for their area. For example, the Utah County Travel Council has produced a very professional information and travel guide for the area. This 24-page booklet contains 16 photographs that were taken on the Uinta National Forest. There is no mention in the publication that these photos were taken on National Forest System lands. The Uinta is never mentioned in the text as providing outdoor recreation attractions.

4. Are National Forests more beneficial to Utah if they become National Parks?

Recently sections of the Humboldt National Forest were transformed into the Country's newest National Park--the Great Basin. At the March 1987 Utah Governor's Conference on Tourism, the Rocky Mountain Regional Director for the National Park Service applauded the action as a tremendous boon to tourism and the economies of Utah and Nevada. The large audience, composed mostly of private sector recreation and tourism management people, responded with a hearty round of applause. They implied that with National Park designation, these public lands were now worth more to the economies of Utah and Nevada. The Park Service's basic change in land management will be the addition of a visitor center and increased interpretive signing. It is possible that new National Parks will also be created from National Forest System lands in Idaho and Oregon. To many Americans, the National Forests are just tree farms and grazing pastures. There is a perception that the Forest Service does little to contribute to recreation and tourism opportunities in Utah.

5. Do the numbers tell the story?

Utah's 13 National Parks and Monuments are scenic wonders and provide millions of Recreation Visitor Days and economic benefits to the State. They have set the standard for other agencies. Much of their success has come from a very deliberate marketing strategy. How do the Utah National Forests compare to the State's National Parks in terms of recreation outputs and funding levels (two very important indicators of public and Congressional support)? In 1986, the 13 National Parks and Monuments in Utah registered 6,696,000 Recreation Visitor Days with an annual recreation budget of \$11,503,900. This resulted in an average cost per RVD of \$1.72. In 1986, the 6 Utah National Forests produced 13,306,100 RVD's with a recreation budget of \$5,544,000. (See Table II, pages IX-7 through IX-8.) This resulted in an average cost of \$0.38 per RVD. The Utah National Forests supply twice as many RVD's as the National Parks. The National Forests also have to provide these visitor days at half the cost of the National Parks and Monuments, which have much greater support from Congress and the public as a whole. Greater funding allows the National Parks to keep sites in better condition and provide a wider range of visitor information and interpretive services than the Utah National Forests.

The Intent of This Project is Not to Stimulate Competition with the National Parks for Tourism or Congressional Funding. The National Forests should not compete with other agencies for pieces of the visitation and funding pie. We need to complement each other and work together to make the pie bigger so that everyone will benefit in terms of better service to the public. As Tom Peters said in his book, Thriving on Chaos, "We must bake a new pie, focus on market creation, not market sharing."

6. We have seen the enemy, and he is us!

WE SEE OURSELVES AS LAND MANAGERS AND PRODUCERS OF GOODS AND SERVICES. There is nothing particularly wrong with that. However, when we describe our success almost exclusively in terms of board feet of timber, developed site capacity, and visitor days--not consumer satisfaction--the world is going to pass us by. When citizen-owners complain that we are imposing our values on them, then we are not doing a good job of responding to visitor preference and need. In today's society, the producer of any product who measures success only by the number of items produced will not survive.

SOME HAVE A PERCEPTION THAT THERE ARE TOO MANY RECREATIONISTS ALREADY. This raises the question, "Why market?" The question indicates a lack of understanding of the meaning of marketing. Strategic marketing calls for customer satisfaction and proper use of the resource, not indiscriminate advertising. Clearly, there are recreation opportunities that should not be advertised, such as wildernesses, areas of discovery, and areas that receive full capacity use during most days of the season.

SOME OF THE PEOPLE THE FOREST SERVICE NEEDS THE MOST CANNOT MEET ENTRY REQUIREMENTS. Disciplines that are routinely employed by other recreation providers do not have job series in the Forest Service. There is no perceived Forest Service career ladder for people who want to be involved in recreation marketing strategy development.

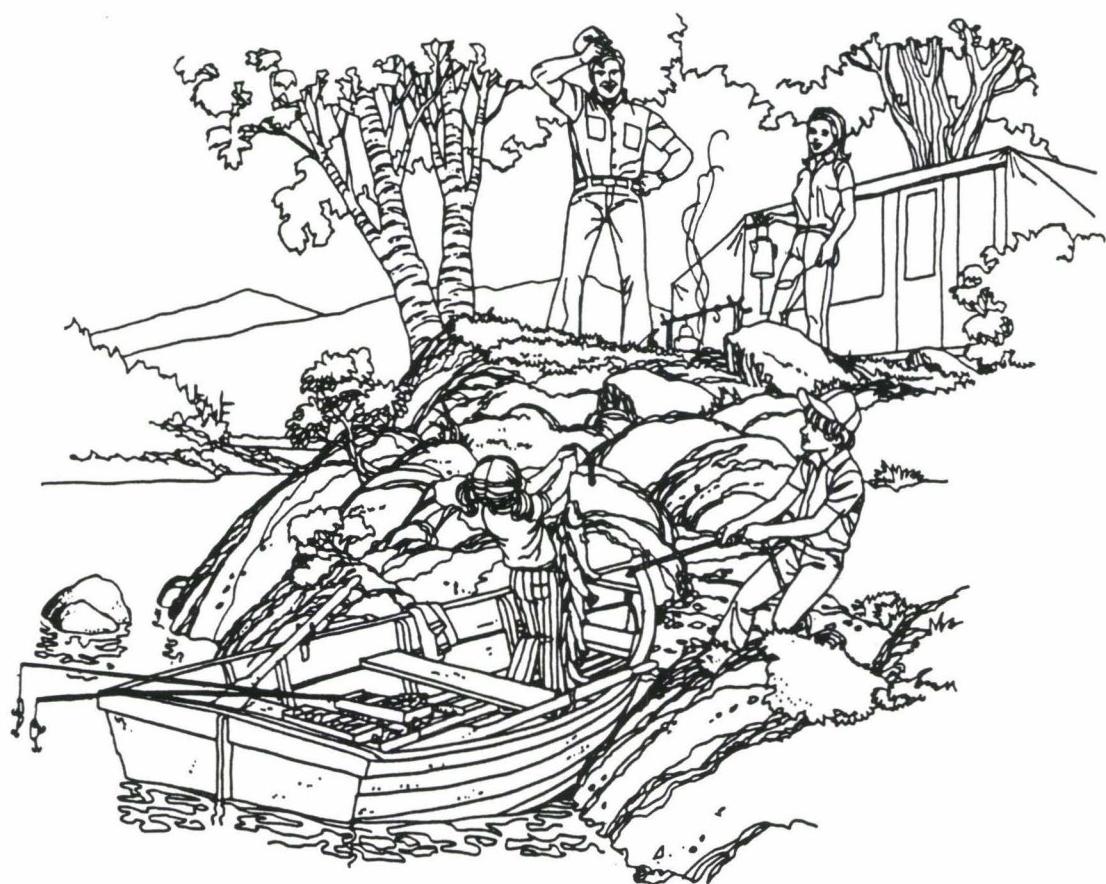
STRONG IDENTIFICATION WITH A FOREST OR DISTRICT SETS UP BARRIERS TO FORMING PARTNERSHIPS TO MEET CUSTOMER NEEDS. While strong identity with a home unit produces valuable esprit de corps--a strength of the Forest Service--it leads to provincialism which is a barrier to creative thinking, idea sharing, and formation of valuable partnerships.

WE LACK WAYS OF DETERMINING CUSTOMER PREFERENCES AND NEEDS. The Office of Management and Budget (OMB) has ruled against the Forest Service conducting official user surveys to determine satisfaction and preferences. Our public feedback system consists only of occasional Forest Planning public meetings, visits to our offices, telephone calls, or written letters. Generally, these contacts are 1-way discussions and do nothing to foster interactive communication with customers.

WE HAVE RESPONDED POORLY TO BUDGET CUTBACKS IN RECREATION FUNDING. Some Regions and Forests have responded to decreased recreation funding by closing recreation sites or turning management of public sites over to private concessionaire operators. It isn't wrong, by itself, to turn developed recreation sites over to private concessionaires, but then the Forest Service is totally removed from the recreation scene, and our image suffers. Problems occur when concessionaires are not trained as "Good Hosts" and to serve the public and present a desirable Forest Service image.

CHAPTER II

OPPORTUNITIES



The following general opportunities are available to the Utah National Forests and will be explored in depth further in the report:

1. Many state travel councils have commissioned extensive and costly tourism studies to assess the effects of travel and tourism marketing. Most of these studies include the following:
 - a. Identification and definition of the state's travel market.
 - b. Assessment of the state's image and position in National and international markets.
 - c. Recommendations for an ongoing system for tracking travel data.
 - d. Evaluations of the traveler's experience in the state.
 - e. Determination of the economic impact of tourism on the state's economy.
 - f. Assessment of the effects of current marketing strategies.

Helpful information can be gleaned from these studies. The National Forests can use it to assess their position in the recreation and tourism market and to formulate an effective marketing strategy.

2. Numerous National surveys have been initiated recently to determine social-economic trends that are occurring in the American recreating public. National trends have been observed that will have a profound impact on how we should continue to provide recreation goods and services, i.e., increases in the senior citizen population and the number of working couples. We should study these trends and, where possible, respond to existing and future changes in customer preference and needs.
3. We have the opportunity to enhance our public image. The National Forests provide the public with opportunities to participate in recreation activities. The National Forests are not just to see; they are to enjoy and experience. The public can fish, hunt, ski, ride ATV's and mountain bikes, and participate in many other activities that are restricted or prohibited in the National Parks.
4. There is an opportunity to provide enhanced opportunities for all segments of the American public, including handicapped users, young children, senior citizens, and organized groups. We should be willing to provide greater accessibility and enjoyment for these groups.
5. Existing transportation systems can be developed to become a tremendous asset in a statewide marketing strategy. The Appalachian Trail has been a great boon to the states it passes through. This same opportunity exists in the intermountain states. The road systems on the Utah National Forests possess the potential to provide a scenic

highway or byway alternative to the interstate highway system. As Derrick Crandal of the American Recreation Coalition put it, "The state highway departments have given us the roads we need, it is up to the Forest Service to provide the roads we will love."

6. There is a new opportunity to revitalize interpretive programs through formation of state and local interpretive associations. A good interpretive service program is vital to any Forest marketing strategy.
7. Many state tourism and travel councils seem anxious to work with the National Forests on a combined marketing effort. This is not happening because we usually give the impression that we are not interested in travel and tourism marketing. It is up to the National Forests to make the first contact, set the tone of the relationship, and follow through on commitments.
8. Recently, Congress passed legislation giving National Forests authority to retain recreation user fees at the Forest-level to help administer recreation programs. The opportunity is now available to institute a "pay as you go" recreation management program on the National Forests. If the Forest Service was encouraged to become self-sustaining by returning the full 75 percent of collections to Forests, marketing would become an integral part of the recreation program.
9. The new legislation also gives the Forest Service authority to establish contract reservation and information services. It allows the contractor to charge a commission or convenience fee to the public for providing the service. This has vast potential for providing greater public service in partnership with the private sector.
10. The opportunity exists for study and designation of National Forest areas and features as something "special." This would highlight their role in contributing to tourism and the economy of the state. These designations might include National Recreation Area, Wild and Scenic River, or Scenic Area status. Designations should not preclude accessibility by senior citizens and handicapped users.
11. The opportunity exists to collaborate with other Federal, state, and local recreation providing agencies. The intent would be to develop new and innovative ways of providing better customer service, enhancing our image, and promoting the economy of the state. In most cases, the first contact is up to us!
12. Fee structures and differential pricing have the potential to affect the supply and demand side of a statewide National Forest marketing strategy. User fees should be analyzed and used to achieve the marketing aims of each Forest. In the past, fees have been set in a "knee jerk reaction" to what other agencies and businesses are charging. It's not bad business to know what others are doing, but their actions should not dictate the direction of National Forest programs.

13. Through the Forest Planning process, the public has mandated that recreation potential be more fully developed for the Utah National Forests. Each of the six National Forests in the state have final Land Management Plans. In every case, these plans reflect the public's identified need for the Forest Service to move recreation into its full role in multiple use management.

CHAPTER III

MARKETING - A DEFINITION &

STRATEGY FORMULATION



General Definition

"Marketing is a human activity directed at satisfying needs and wants through the exchange process."

Forest Service Oriented Definition

"A marketing orientation implies that the Forest Service will make every effort to sense, serve, and satisfy the needs and wants of its clients (customers, users) within the constraints of its budget and legislative authority.

Marketing may very well determine the success or failure of all organizations, including the U.S. Forest Service. In the private sector, many times 50 percent of every dollar spent goes to cover marketing costs. Without marketing, there would be no newspapers, magazines, television shows, or radio programs. All are paid for by advertising which is a part of marketing. Marketing is vital for economic development within the State of Utah. The National Forests have a stake in this economic development. For decades, the Forests have harvested timber and grazed livestock to stimulate Utah's economy. Now, recreation and tourism can also accomplish this purpose. The casual observer can't miss the fact that recreation and tourism are supplementing and in some cases supplanting heavy industry, including logging and mining, to bolster the state's economy.

There are some key marketing terms that we need to become familiar with in order to better understand how we can benefit from a statewide National Forest marketing strategy:

1. Products - A product is anything that can be offered to a market for acquisition, use, or consumption that might satisfy a want or demand. It may be a physical good such as timber, firewood, Christmas trees, etc. The product may be a service such as providing for recreation facility use, i.e., campgrounds, boat ramps, picnic areas, scenic roads, and trails.
2. Needs - Needs are a feeling of deprivation of some satisfaction. If the need feeling is strong enough, it will motivate a person to satisfy it. Some Forest visitors might have the need for fresh air, solitude, pursuing a favorite activity, or social interaction with other Forest visitors.
3. Wants - Wants are a desire for specific satisfiers of the deeper needs shaped by culture and individual personality. An example of this would be the demand for developed group campsites in the State of Utah due in part to the influence of the predominate cultural/religious lifestyle.
4. Demand - Wants become demands when backed by purchasing power and a willingness to buy.

5. Exchange - Obtaining a desired object or service from someone by offering something in return.
6. Publics - Any group that has an actual or potential interest or impact on an organization's ability to achieve its objectives.
7. Selling - Selling focuses mostly on the needs of the producer and seller vs. marketing, which focuses on the needs of the target customer.
8. Marketing Process - The marketing process can be outlined in four steps:
 - a. Developing the organization's strategic plan.
 - b. Analyzing market opportunities.
 - c. Selecting target markets.
 - d. Developing marketing strategies and the marketing mix.
9. Marketing Mix - This is the particular blend of controllable marketing variables that the organization uses to achieve its objective in the target market.
 - a. In Goods Marketing, the marketing mix consists of the familiar "4 P's":
 - (1) Product - May involve a physical good and/or service. It should satisfy some customer's needs. Because of the intangible nature of services, product planning is much more difficult than for physical goods. A service is a performance. It must be experienced; it cannot be touched, photographed, or posed. Marketers need to concentrate on the intangible value factors of a service performance if possible.
 - (2) Place - Goods and services often move to customers through channels of distribution. A channel of distribution is any series of firms or individuals from producer to final user or consumer. It has less application in services marketing since distribution is usually direct.
 - (3) Price - In setting a price, competition in the target market must be analyzed. Customer reaction to possible prices must also be estimated. If customers won't accept the price, all planning will be wasted.
 - (4) Promotion - This is telling the target market about the "right" product or service. Promotion includes the use of personal selling, mass selling, advertising, publicity, and sales promotions.

- b. In Services Marketing, "3 P's" are added. (The Forest Service recreation program falls into this category.)
- (1) Physical Evidence or Environment - Service marketers need to accurately predict the likely emotional responses of their target customers and provide them with surroundings that trigger positive reactions. The physical environment must not only fit and be appropriate for the service, it must totally support the image of that service. In some ways, it is similar to the physical packaging of a product or good.
 - (2) Participants - In a people based service, such as public recreation, the quality of the service rendered is inseparable from the quality of the service provider. The service employee's personal appearance, dress, facial expressions, speech, attitude, and other characteristics are an important part of giving a desired impression to the customer. Internal marketing is used by successful service organizations to train and motivate employees. Employees are viewed as internal customers and an effort is made to offer internal services or products needed by these customers while addressing the objectives of the organization.
 - (3) Process of Service Assembly - This involves schedules, routines, mechanisms, and supervision of activities to provide the service. Policies are developed to deal with customer complaints, accidents, and other problems without disrupting the service process. Effective process management assures service availability and consistent quality in the face of simultaneous production and consumption. Effective process management also helps in balancing service supply with service demand. Since services cannot be stored or inventoried, the process system must be able to handle peak loads and optimize different customer needs without reducing the service quality.

Elements of a Strategic Marketing Concept

The concept begins with development of a Strategic Plan to define the organization's long-term direction and provide a framework for developing marketing strategies. It should be a continuing process. The Plan must be based on the following elements:

1. Definition of the organization's MISSION. "Who are we, and where are we headed?"
2. Establishment of GOALS and OBJECTIVES which describe what the organization aspires to become. Define measurable results the organization hopes to achieve.
3. Formulation of a STRATEGY to determine how the organization's goals and objectives will be achieved and how the organization will match

existing and potential products and services with changing needs of target markets.

4. Implementation of the organization's STRATEGIC PLAN. This is a blueprint to clearly communicate direction and strategy the organization intends to follow in conducting its activities.

The above concepts are applied to the Utah National Forests using mission statements issued by the Chief's Office and the Intermountain Region, and through goals and objectives collectively contained in each Forest's Land Management Plan. Following is a MISSION statement and GOALS and OBJECTIVES for the Utah National Forests:

1. Mission

The recreation mission of the Utah National Forests is to better serve the people and to provide the highest quality outdoor recreation experience possible. We will significantly increase outdoor recreation opportunities without detracting from existing Forest Service resource programs, expand our already diverse and extensive role in outdoor recreation, and promote tourism-based rural economic development in Utah.

2. Goals and Objectives

- a. Improve and modernize existing recreation facilities.
- b. Emphasize quality recreation settings and opportunities.
- c. Provide more interpretation.
- d. Showcase some features, e.g., National Recreation Areas, trails, Forest highways or byways, etc.
- e. Look for sources outside the Federal Budget to support new work.
- f. Build supportive partnerships with other agencies and the private sector.

Formulation of a Strategy and Strategic Plan

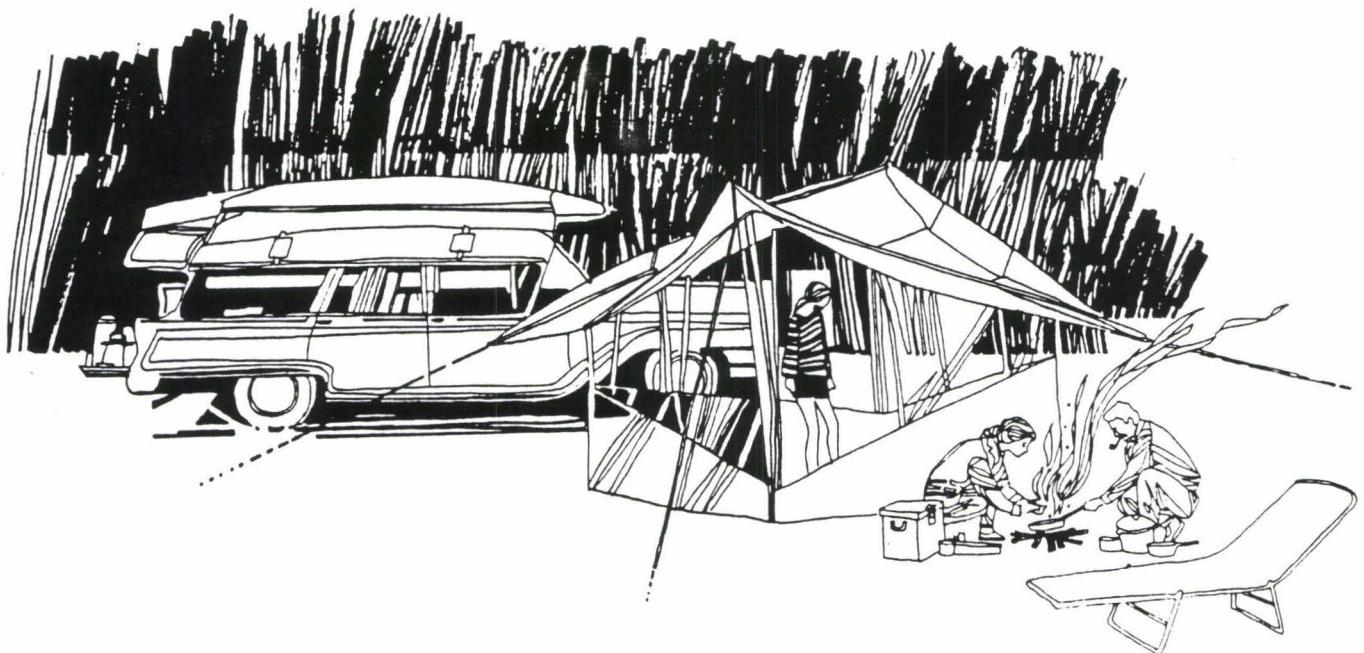
1. Focus on Change and Recreation Trends

- a. Use surveys to determine customer needs and to increase customer satisfaction
- b. Determine how customers have changed and how to respond to those changes.
- c. Implement recommendations from the President's Commission on the America's Outdoors, where appropriate.

- d. Implement Forest Plans.
 - e. Round out multiple use management.
2. Strategic Plan
- a. Emphasize Publics/Customers
 - (1) Be aware that customer satisfaction is extremely important.
 - (2) Listen to the customer.
 - (3) Provide interpretation, environmental education, and information.
 - (4) Provide economic benefits in rural communities.
 - (5) Increase quality of life for customers.
 - b. Emphasize Partnerships
 - (1) Use "Joint Venture Agreements."
 - (2) Develop partnerships with other providers and under represented groups.
 - (3) Improve attractiveness for private investors.
 - (4) Nurture partnerships after they are started.
 - c. Forest Service Emphasis
 - (1) Strongly pursue excellence.
 - (2) Search for innovative funding and leveraging.
 - (3) Increase training and internal marketing efforts.
 - (4) Emphasize environmental education, family activity, and youth development.
 - (5) Protect the importance of "Places."
 - (6) Recognize trails and Forest highway use and value.
 - (7) Provide leadership and technical assistance.
 - (8) Expand research on needs and preferences.
 - (9) Reward for customer service and excellence.
 - (10) Implement Forest Plan direction.
 - (11) Communicate goals and successes to the public and Congress.

CHAPTER IV

MARKETING DATA & STUDIES



Baby Boomers

In her article, "Baby Boomers-The New Marketing Challenge," Ellen O'Sullivan stated,

"In the 1990's and beyond, perhaps the biggest and most promising challenge will be developing marketing strategies to deal with the baby boomers. The 76 million Americans born between 1946 and 1964 represent the largest segment of our society. This group, reaching the peak of its earning power, coupled with the physical, family, and attitudinal changes brought about by the onset of middle age, will be the group for leisure delivery systems to target as markets for their programs and services. This is the best educated generation to reach middle age in this country. Education relates to earning power and puts baby boomers in the position of controlling nearly half the Nation's income. Many of the baby boomer couples are now dual wage earners. Experts predict that by 1995, 40 percent of baby boomers will have discretionary income in excess of \$10,000 per year to spend on entertainment and recreation."

Many of these affluent families are investing in recreation vehicles and equipment that are urban in nature but meant to take them to the woods in style. This makes them ideal consumers for recreation and leisure service organizations. There is also another factor that makes the baby boomers special for recreation agencies. This is the first generation reared with regular exposure to and involvement in camp and organized youth activities and sports. This generation expects positive and enjoyable outlets for their leisure time. Although they have less leisure time than their parents because of career and family responsibilities, baby boomers treat leisure time as a necessity. They see leisure as a birthright.

Empty-nesters are couples who had their children as young adults and now are witnessing the flight of these children from home. Seemingly overnight, this group of baby boomers possess newly discovered discretionary time and income. They are now free to follow their own paths for recreation activities.

Leisure Time Trends

In this era of labor-saving devices at home and enlightened labor policies in the workplace, we are spending less time in required tasks and more time in freely chosen leisure pursuits. A number of recent studies present a contrary picture in which leisure time is decreasing and time spent working, commuting, and studying is increasing. A 1984 Louis Harris poll indicated, "Over the past decade, for the average American, the amount of leisure time has shrunk 31 percent--a loss of 8 hours per week.

We are taking shorter, more frequent vacation trips. A 1986 survey on leisure and recreation by Market Opinion Research (MOR) in support of the President's Commission on American Outdoors included questions on vacation

patterns. The MOR report stated, "The current pattern for three-fourths of American adults includes 1-2 vacations of a week or more during a year and multiple numbers of mini-vacations." There are indications that the extended vacation of 2 or more weeks is becoming less common, losing out to long holiday weekends or other short blocks of time on several occasions throughout the year. The MOR survey reported, "Three out of 10 adults took 6 or more long weekend or mini-vacations during 1985 and another one-fifth took 4 or 5."

Travel distance for short outings, day outings, and overnight trips has dropped sharply. Recreationists are apparently staying much closer to home than they did 10 years ago. Cordell and English's 1982 National Recreation Survey revealed that in 1972, less than 30 percent of short outing trips were within 10 miles of home, and 55 percent were within 20 miles of home. In 1982, 76 percent of short trips were within 10 miles of home, and almost 90 percent were within 20 miles of home. Compared to 83 percent in 1972, only 37 percent of overnight trips in 1982 were over 100 miles from home.

While time for leisure pursuits appears to be declining, the number and variety of activities available to individuals is at an all time high. Faced with this diversity, many people are choosing to limit the number of leisure activities in which they participate and to concentrate greater effort to master their chosen activities.

Leisure time varies with sex, age, ethnic group, and family status as may be expected. The 1984 Lou Harris poll notes that those over 65 report an average of 25.4 hours of leisure per week compared with a baby boomer generation average of 16 hours per week. Further, in the latter group, women are reported to have 23 percent less leisure time than men. Among ethnic groups, while both report working slightly more than 43 hours per week, Blacks have 12.2 hours of leisure and Hispanics 18 hours of leisure per week.

Closer to Home - Utah and Idaho State Tourism Studies

In March 1986, the Utah Travel Council awarded a contract to the U.S. Travel Data Center to provide research and data that would help to market travel and tourism throughout Utah. The Data Center conducted the following surveys to gather information:

1. Interviewed more than 21,000 U.S. residents about their travel and tourism views of Utah.
2. Inventoried Utah's tourism-related facilities.
3. Modeled the U.S. travelers' expenditures in Utah and their impact on the economy of the State.

Some of the Data Center's findings follow:

1. In 1987, U.S. residents living outside the State took 10.6 million person trips to Utah of 100 miles or more. Foreign visitors added another 315,000 person trips.

2. Of the four major Rocky Mountain states, Utah ranked fourth in out-of-state visits (10.6 million). Nevada was first (27.5 million person trips), Arizona ranked second (25.0 million), and Colorado was third (23.0 million).
3. Californians provided the highest number of out-of-state visitors to Utah with 2.2 million.
4. Less than half the total trips to Utah were during the summer months.

Trip Characteristics

1. Three-quarters of the respondents said they viewed scenery while in Utah.
2. Over half of Utah's visitors arrived by motor vehicle. Only 15 percent had camping equipment.
3. The farther the origin of the visitors, the more likely they were to arrive by air.

Traveler Characteristics

1. The average visitor was 44 years old. One-third were over 54 years old. Utah visitors are significantly older than visitors to other Rocky Mountain states.
2. More than one-third of visitors to Utah boasted annual incomes greater than \$40,000. This is significantly higher than for visitors to other Rocky Mountain states.
3. Visitors to Utah were more likely to be here for outdoor recreation purposes than the average Rocky Mountain traveler. They were also much more likely to be traveling in a recreational vehicle or with camping equipment.
4. Less than one-fifth of travelers to the state were first-time visitors.

Visitor Perceptions

1. Among Utah visitors, outdoor recreation is the attraction that comes most to mind. Outdoor recreation is little recognized by non-Utah visitors. Indeed, 4 of 10 nonvisitors to Utah could name no attractions in the state.
2. Visitors to Utah rated the state's scenic beauty as the highest among vacation choice factors.
3. Nevada is by far the best current market for Utah, based on number of visits generated per population. Southern California was second.

Recommendations

1. Utah should target specialized markets that exist in the U.S. for camping, skiing, white water rafting, hunting, fishing, and other outdoor recreation activities.
2. The state should devote additional marketing resources to Nevada, Arizona, and Southern California.
3. The state should work to increase awareness of Utah as a travel destination.

The Idaho Study

The survey, formally titled "The 1987 Idaho Leisure Travel and Recreation Study," was conducted by the College of Forestry, Wildlife, and Range Sciences at the University of Idaho. The year-long study cost over \$130,000 and surveyed over 10,000 travelers at 36 roadside stations throughout the state. The study found that 44 percent of the vacation travelers were from Idaho; 56 percent came from out-of-state, mostly from California. The study identified the typical out-of-state tourist as follows:

1. Was a 44-year-old male from California, arriving by car.
2. Had attended college.
3. Was a professional or technical worker.
4. Had a household income of less than \$30,000.
5. Traveled in a family group.
6. Arrived in the summer, staying overnight in a hotel or motel, although he was nearly as likely to camp in a public campground.
7. Participated in an outdoor activity with a natural resource setting.
8. Was passing through the state on the way to another destination.
9. Planned the trip 1 to 3 months in advance.

Recreation Trends in the Utah Population

Many of the characteristics and preferences cited above apply to the state's population, but Utah also has some unique demographic features. Some of them follow:

1. Although Utah is becoming more diversified as people move into the state, the Church of Jesus Christ of Latter-Day Saints (LDS) still dominates the culture. This has a strong influence on outdoor recreation agencies because the LDS Church promotes outdoor recreation

activities through Stake and Ward outings, girls camps, and to a lesser degree, Boy Scout activities.

2. Again for religious reasons, many Utah families have developed family organizations and groups. These groups normally choose outdoor recreational settings to hold official family meetings and social functions.
3. A large percentage of the state's population are hunters and fishermen. On a typical opening day of deer season, there may be 250,000 hunters in the field.
4. Most of Utah's population is centered next to the Wasatch Mountain Range in the zone from Logan on the north to Nephi on the south, commonly referred to as the Wasatch Front. Because of this fact, the majority of the state's population is less than a 1-hour drive from National Forest recreation sites. Utahns have grown up with the mountains in their "back yard," and they are very outdoor recreation oriented.

CHAPTER V

MARKETING MIX ALTERNATIVES



The seven "P"s are the basis for any good services marketing mix and strategy. Specific proposals for Utah's National Forest Marketing Strategy are categorized under the seven headings: PRODUCT, PLACE, PRICE, PROMOTION, PHYSICAL ENVIRONMENT, PARTICIPANTS, and PROCESS OF SERVICE ASSEMBLY. Proposals or alternatives presented here are evaluated in Chapter VI.

PRODUCT

A key factor in designing the product offering is the need for more in-depth research by the Utah National Forests. This will help in understanding what the service entity means to our target markets. We must do a better job than we have in the past of determining what our customers want and need. We have to implement some kind of user demand and preference surveys.

Alternatives

1. Official OMB Approved Surveys - The Office of Management and Budget has instituted a policy that Government agencies must receive special approval before conducting public surveys. Approval and funding should be sought in order to hire survey specialists to conduct extensive studies of National Forest user needs and preferences.
2. Internship Surveys - Internship agreements could be created with local Universities to design and conduct surveys and analyze results.
3. Unofficial Surveys - Unofficial surveys could be conducted by force account employees, concessionaire operators, reservation system contractors, and contract campground operators. Surveys would need to be well designed and simple to use.

We also need to look at ways to improve our product and meet public needs.

Alternatives

1. Improvement of Facilities - Because of their intangible nature, product planning for services is much more difficult than for physical goods. It is necessary to provide a tangible environment for the consumption of services. In addition, many recreation services require peripheral services and facilities. For example, a typical family looking for an enjoyable camping experience expects a well designed and maintained campground with clean, odor free toilets (usually flush); adequate cooking, fire, and table facilities; and in most cases a forested environment. Too often in Utah's National Forests, these facilities are totally inadequate or in such a state of disrepair that they should be closed.

The Utah National Forests should initiate a 5-year program to reconstruct and enhance existing developed recreation sites. This should only be done after determining that existing facilities meet public

need and can be managed efficiently. Options for accomplishing this 5-year program follow:

- a. Congressional Appropriation - The Regional Forester of the Intermountain Region could request a large funding package, through the Chief's Office to Congress, for the Forests' backlog in developed site reconstruction. Current estimates indicate that there is a \$38 million backlog in reconstruction needs in the Intermountain Region.
 - b. Partnerships and Challenge Cost-Share - The Utah National Forests could pursue partnerships with private businesses and corporations to reconstruct existing sites. Long-term permits could be awarded to non-Forest Service companies to operate sites and retain fees in exchange for supplying reconstruction capital. Challenge cost-sharing with other agencies and communities is a strong option for the National Forests. Many Federal, state, and local organizations would willingly supply matching funds and labor to help meet recreation needs of the public we all serve.
5. Special Opportunities - Special opportunities could be created and provided to encourage customers to enjoy a National Forest recreation experience. Some ideas that could draw out-of-state visitors to Utah and encourage a longer stay in the state are:
- a. Utah Scenic Forest Highway - A Utah Scenic Highway, from the northern to the southern border, could be developed to encourage out-of-state visitors. Currently, I-15 is the only north/south travel option for visitors to the state. It traverses much of Utah's arid country. A Scenic Highway would closely follow the spine of Utah's National Forests. For the most part, it would be on existing road systems. Some construction, widening, and paving would need to be completed, but this could be accomplished over a 10-year period. The Utah Department of Transportation has given the public the roads they need, now it is up to the National Forests to give them the roads they will love!
 - b. Great Western National Recreation Trail - A trail system, similar to the Appalachian and Pacific Crest Trails, could also be designated north to south through Utah. Most of the trail system is in place and ready to be designated as a National Scenic Recreation Trail. It could become part of a National trail proposed from Canada to Mexico. Ground work for just such a trail has begun and the name "Great Western Trail" has been adopted to promote the effort between the states of Arizona, Utah, Idaho, and Montana.

PLACE

A product produced by the National Forests is a recreation service. Distribution is direct; customers must come to us for the service. Local and

out-of-state markets should be analyzed and recreation facilities designed and operated to meet public needs.

Alternatives

1. Conversion to Day Use - Day-use facilities located close to the state's urban population areas are in great demand. After work and on weekends during the summer months, many people want to get away from the congestion and heat of the cities. Existing facilities located within a 60-minute travel distance from urban areas should be evaluated and converted to day use, if appropriate.
2. Special Settings - The National Forests could concentrate campground development in areas of scenic beauty and natural wonder. This would help to increase the number of out-of-state visitors and encourage them to remain in the state for longer periods of time. Where possible, these efforts could be coordinated with the National Park Service, Utah State Parks, and other agencies. Long-term operating permits could be granted to private investors to encourage facility development in scenic areas.
3. Additional National Recreation Areas - Special areas could be designated that signify the importance of outdoor recreation opportunities. For example, additional National Recreation Areas could be created in areas such as the Wasatch Front, Strawberry Reservoir, Fishlake, and Pine Valley Mountains. Wild and Scenic Rivers could be designated, including the Green River below Flaming Gorge Dam and the Strawberry River below Soldier Creek Dam.
4. Ski Areas Under National Forest Permit - We could capitalize on existing recreation opportunities, such as Nationally known Utah ski areas that are under Forest Service permit. As partners in providing millions of winter and summer Recreation Visitor Days, we could work with ski operators to provide a year-round diversity of recreation opportunities. We could also work with them to enhance the image and presence of the Forest Service through signing and increased National Forest visitor information services.

PRICE

Fee structure and differential pricing have potential to affect the supply and demand side of a state-wide marketing strategy. In order to explore the effects of pricing, the following analysis is provided:

Issues Related to Setting User Fees

1. New Congressional legislation provides for recreation user fees to be returned where collected. The Utah National Forests need to determine National and Regional direction for fee structures and how they affect operating income to the Forests.

2. Forests need to determine public reaction to user fee increases and differential pricing structures.
3. Forests should review pricing structures for surrounding Federal, state, local, and privately run recreation sites and determine their effect on Utah's National Forests.

Alternatives

1. Status Quo Alternative - Fees range from \$3 to \$6 for most National Forest campgrounds in Utah. This fee structure would remain in place for the next 3 years.
2. "Pay as You Go Fee Structure" - User fees would be set at the "break-even point." This is defined as recovering operation and maintenance (O&M) costs and facility replacement costs at the end of their useful life period. With the average current occupancy rate, we should charge \$7.82 per night per single family campground unit and \$1 per person per night at group sites in order to recover O&M and replacement costs. (See indepth analysis in Table I, pages IX-1 through IX-6.)
3. Make a Profit - Fee structures could be set to recover operating and replacement costs, and make an additional 25-percent profit. Single family unit fees could be set at \$9.30, and group sites at \$1.25 per person per night.
4. Differential Pricing - A differential test pricing structure could be implemented at 25 percent of the most popular campgrounds to increase mid-week utilization. Experiments could be done with fees. Some could be set at \$10 per night for weekends and holidays, and \$5 during weekdays. Others could be set at \$8 for weekends and holidays, and \$5 for weekdays. The most effective fee structure could be determined through data collection.
5. Collect Time Series Data - To determine the effect of fee increases, extensive time series data should be collected during the 1988 camping season. The data would reflect the publics' acceptance of fee increases and their impact on occupancy rates. This data could be collected by seasonal employees, campground contractors, or volunteers.

PROMOTION

In the National Forest system, personal selling, advertising, and publicity are important communication tools. Sales promotions are seldom used because of the services nature of our business. We now have the opportunity to effectively use all of these tools to focus on our target audiences. The following alternatives may be used to market the Utah National Forests' recreation programs.

Alternatives

1. Camp Stamps - The National Camp Stamp program provides a 15-percent discount on fees if stamps are purchased before camping trips. This can be an effective marketing tool if used as a sales promotion technique. We should stress the "value added" features of Camp Stamps (15-percent discount, no need to carry cash, suitable for gift giving, etc.). The Camp Stamp program message should be an invitation to the American camping public to use and enjoy their National Forests at a fee discount. Vendor and bulk purchase plans give private businesses an extra discount or commission to sell Camp Stamps. Private businesses will normally promote Camp Stamps for us. Vendors should be selected who supply goods and services to customers using the National Forests and who can effectively advertise to those target markets.
2. Scenic Photo Books and Video Tapes - Scenic photo books and video tapes can be used to effectively emphasize that the Utah National Forests have some of the most spectacular scenery in the state, providing a multitude of recreational opportunities. These books and tapes can be very costly to produce on limited budgets, but they can be produced at little cost to the Government. Many publishers and video producers will assist in designing a product and then publish or produce it at their own cost if allowed to retail it for a profit in gift and souvenir shops, restaurants, and stores.

A scenic picture book is now being published for the Utah National Forests by Blackner Publishing Company in Cedar City, Utah. The only cost to these Forests was for time to provide color slides and photos and to assist the publisher in design and layout. This book contains 56 pages of scenery and recreational photos and will retail for \$5.95 at selected outlets. The National Forests can effectively use these books and tapes in specific marketing plans as they work with local and state travel councils, officials, and Congressional Delegations. Interpretive associations can also use them to effectively market the Utah Forests.

3. Discovery Tours - Discovery tours are becoming extremely popular on public lands. The Utah National Forests have scenic highways and secondary paved roads that go through some of the most spectacular scenery in the intermountain west. Private vendors could be sought to establish discovery tours on the Utah National Forests. These could include airlines, car rental agencies, and travel agencies for a total tour package that would include airfare, hotel accommodations, meals, and motor transportation.
4. Telephone Reference Guides - Many telephone companies publish full-color telephone book guides to promote special features and scenic beauties of the local area. These are provided at no cost to agencies; the only investment is supplying photos and providing written text for the guide section. The Utah Forests should take advantage of this opportunity. It will allow them to market special features through these widely used publications.

5. Interpretive Associations - If established properly, these associations can be very useful in promoting Utah's National Forests. Since they are pledged to promote the Forests, they could provide appropriate advertising and media promotions that are not within most National Forest budgets. By working with elected officials to gain greater Congressional support, interpretive associations could also function as separate lobbying structures to promote the image of National Forests as public service agencies.
6. Limited Area Radio Broadcasts - Limited area radio broadcast units can be purchased and installed for under \$5,000. This would provide travelers with a place to tune in for information on recreation opportunities and messages inviting them to use the National Forests.
7. Ad Agencies - The Armed Forces, Postal Service, and other agencies have effectively used ad agencies to promote their programs. Ad agencies will conduct market identification searches to determine the best media buys to most effectively reach target audiences. They will then suggest printed media, radio and television stations, and outdoor advertising (billboards) to appeal to the markets of interest. Ad agencies also provide artwork and radio and television spots to be used in purchased ads and promotions. Fees for this service usually start at \$5,000 or more, depending on the scope of the media campaign. This fee does not include purchase of advertising spots or time on radio or television stations.
8. Promotional Brochures - Promotional brochures can be used to highlight special scenic features and recreation opportunities. Brochures must be professional, include color photos, and have limited text. (Studies indicate the public is deterred from reading brochures if they have too much text.) Brochures can be produced in a number of ways:
 - a. They can be funded and produced with graphics assistance at the Forest or Regional Office level.
 - b. Interpretive associations can often provide the necessary funding to design and print brochures.
 - c. Promotional brochures can be cooperatively produced with other Federal, state, or local agencies. A good example is the brochure that was jointly produced by the National Forests and National Parks in the Pacific Northwest Region. A local example is the Mount Nebo Scenic Loop brochure that was produced and printed by the city of Nephi, Utah. Photos and artwork were provided by the Uinta National Forest.
9. Travel and Recreation Shows - These shows are effectively used by private businesses and organizations to promote their programs. The Utah National Forests should produce a professional exhibit to be used throughout the state to promote the six National Forests. This could be used at boat and travel shows, county and state fairs, the Utah Freedom Festival in Provo, and the Festival of the American West in

Logan, Utah. Individual themes could be developed or adapted for these festivals which are becoming popular as a way to promote the economy of local areas. For example, a "Room to Roam" theme could be used at the Freedom Festival and the Forest Service "Western History" could be used at the American West Festival.

10. 1-800 Number Reservation System - A toll-free, telephone system for making campsite reservations at National Forest and State Park campgrounds in the State of Utah has just recently been created. This system is being provided by a private contractor, MISTIX Corporation, with a reservation center in Park City, Utah. This service is offered to the public at no cost to the Government. MISTIX charges customers a small convenience fee for each reservation. Visitors anywhere in the country can now be assured of a campground reservation when they visit Utah. MISTIX also handles reservation systems for the States of California and Colorado--two of the most important points of origination for visitors to Utah. This reservation system will assist Forests in shifting use from over-utilized popular sites to high quality lesser-used sites. It should also help optimize campground occupancy by shifting some use from weekends and holidays to mid-week. (For a complete explanation of this system, please see Table IV, pages IX-19 through IX-20.)
11. State-wide Welcome Centers - Many states, particularly those in the South, have established welcome centers along major entrance routes. These are employee-operated centers that provide information on opportunities in the state--lodging, recreation, scenic, etc. The major purpose of these centers is to encourage visitors to stay longer, stimulating contributions to the state's economy. These centers could be cooperatively developed and funded by the State of Utah, the National Forests, and the National Parks. Four centers (situated on I-15 at St. George and Tremonton, I-80 at Echo Junction, and I-70 at Green River) would provide coverage for 95 percent of the tourists traveling the state by vehicle.
12. Utah State and Local Travel Councils - Travel councils are funded by the state and counties to promote tourism and the economy of the state and local areas. The Utah National Forests could contact local travel councils to let them know the Forests are willing to help them meet their objectives. The Utah Forests could provide travel councils with high quality photos and slides to be used in promotional material. They could also offer to participate in promotion material production and distribution costs. The Utah Forests should work with other Federal and state recreation agencies in a united partnership to assist travel councils.
13. Promotion Specialist - A new Forest Service position could be established as a promotion specialist for the six Utah National Forests. This would be a temporary position, not to exceed 2 years. This employee would provide the necessary leadership to refine and implement a state-wide marketing strategy for the Utah Forests. This person could be recruited from the private sector, but should be knowledgeable about the mission and objectives of the Forest Service.

14. Expand the Role of Public Affairs Officers - Many of the Utah Forests have Public Affairs Officers (PAO's) to write and issue news releases and handle basic media jobs. These positions could be expanded to include marketing responsibilities for each respective Forest. Existing PAO's would receive specialized marketing training. As future PAO's are recruited, selection criteria should include marketing abilities and expertise.
15. News Releases and Public Service Announcements - These media methods have traditionally been used to promote new and expanded Forest Service programs. The Smokey Bear and Woodsy Owl programs have been successfully promoted by the American Ad Council and the media as a public service. As we continue to ask for expanded media coverage, we will be less likely to receive it as a public service. The Armed Services had this same experience when they increased recruitment advertising. A more productive method of gaining media exposure would be to hold special media events. These could be held at recreation sites where reporters and writers could experience the Utah National Forests.
16. Greater Attention to Congress - The National Forests could develop a special promotion plan to deal with the Utah Congressional Delegation. This plan would include tours of Forest areas to show how we are promoting the State of Utah and trying to stimulate the economy through increased tourism. Coordination and briefings with elected officials and their staffs could be increased in an attempt to show we are genuinely interested in the tourism economy of the state.

PHYSICAL EVIDENCE OR ENVIRONMENT

Our customers form images and judgements about our service through many ways. Their perceptions are affected by tangible clues such as site location and design, amenities, cleanliness, and many other variables. Our goal should be to provide customers with appropriate surroundings and features that will trigger positive reactions to our quality of service and organization image.

Alternatives

1. Increased Amenities - Trend studies indicate that the camping public is more urban in up-bringing and less woods-wise. They tend to greatly appreciate comfort and convenience amenities. We must remember our role in supplying outdoor recreation. However, at the same time we should realize that the following items could be provided by the Forest Service or private partners and still allow us to maintain the natural character of campgrounds and recreation sites:
 - a. Ice, firewood, fishing supplies, etc.
 - b. Convenience Stores

- c. Showers
- d. Electrical, water, and sewer hookups for recreational vehicles
- e. Equipment rentals - canoes, boats, bicycles, etc.
- f. Guided hikes or tours

Extra fees could be charged to recover costs for many of these features or private businesses could be allowed to offer these services.

2. Barrier-Free Access - Sites could be made more accessible for the general public and special segments of the public such as the handicapped and elderly. Architectural barriers to campsites, toilets, paved trails, visitor centers, and other facilities could be removed. The National Forests in Utah have undertaken a state-wide study to determine accessibility and costs to bring facilities up to barrier-free standards. A deliberate program could be developed to modify appropriate facilities through force account construction programs and volunteer efforts, where possible.

PARTICIPANTS

A fundamental difference between good and bad service is the way the service is performed. In a people-based service, such as the one provided by the Utah National Forests, the quality of service rendered is inseparable from the quality of the service provider. Customer-contact becomes the key to providing a positive experience for the Forest visitor. We need to find ways to increase contact with the public and ensure that we are making a positive impression:

Alternatives

1. Disneyland Type Training - We could provide Forest Service field-going personnel with specialized training. This would be similar to training provided by Disney Corporation for its employees. For example, they learn the importance of personal appearance, dress, facial expressions, speech, and attitude in dealing with customers. Disneyland has found that maintenance personnel have more contacts and questions from visitors than their full-time hosts. This requires maintenance personnel to have the same skills as hosts. This same situation occurs with field employees for the Utah National Forests. The people we train the least as "Good Hosts" are the ones that contact the public most often--our fee compliance and maintenance people!
2. Hire Recreation Specialists - We could hire more people with specialized education and training in outdoor recreation and working with the public. Many of these people are available in the private sector but cannot enter the Forest Service because there is no job entry series for them. The National Park Service has successfully employed new people through the O23 Recreation Specialist or Planner

Series. The Utah Forests could open recreation management positions in this series in the future.

PROCESS OF SERVICE ASSEMBLY

This involves scheduling routines, mechanisms, and supervision of activities that go into providing the service. The system must be capable of handling peak loads and meeting different customer needs without reducing the quality of service. One of the most efficient means of providing this needed management process is to have a full-time attendant or operator at the recreation site during the season. This management can be provided in several ways:

Alternatives

1. Seasonal Employees - The National Forests could employ seasonal people to live at campgrounds to maintain and operate them. People could be hired based on skills in dealing with the public and managing and maintaining recreation sites. Forest Service managers should be aware that there are inherent higher costs to employ seasonals to do this work. They include:
 - a. Vacation and sick leave and 100-percent unemployment costs
 - b. Night, holiday, and Sunday differential pay
 - c. Per diem, housing, vehicle, and uniform costs
2. Concessionaire Operation - Concessionaire operation of Government-built campgrounds could be another alternative. In this situation, bids are submitted by the private sector proposing how much money will be returned to the Treasury. This proposal is based on estimated campground fee receipts. Most concessionaire operations return from 5-15 percent of receipts. This money goes directly to the Treasury, not to the Forest where fees were collected.
3. Corporation Franchises - Corporations could be allowed to franchise and construct recreation sites on National Forests. Forests would provide the land and setting. Corporations would provide designs and construct and manage facilities with a long-term permit to retain the income. Some corporations the Utah Forests could approach are Disney Corporation, Kampgrounds of America, MCA, etc. Design and construction would need to be appropriate to the National Forest setting, and management would need to be monitored by Forests to ensure the appropriate level of service.
4. Campground Contracting - Private contractors could be used to man entry stations and to perform campground cleaning, maintenance, and fee collection responsibilities. The contractor would competitively bid on the performance of these duties. All collected fees would be remitted to Forests to be used for contract and facility rehabilitation costs.

Contract employees are normally subcontractors, and they do not have to be paid a prevailing wage. They usually own personal trailers, so administrative costs are kept low. Some of the Utah National Forests have contracted operation and maintenance of campgrounds. This has resulted in O&M savings of up to 50 percent and has doubled fee collections in most campgrounds. Since contractors wear official Forest Service uniforms and represent the Service in the eyes of customers, the Utah Forests would need to ensure that contractors receive appropriate "Good Host" and Forest Service image training. (See Table III, pages IX-9 through IX-18, for an in-depth explanation of campground contracting.)

CHAPTER VI

SELECTION OF ALTERNATIVES & IMPLEMENTATION



The purpose of this chapter is to analyze marketing mix alternatives presented in Chapter V. These alternatives present a broad range of possible marketing mix elements. This chapter will attempt to provide a clear basis for a choice among them. Each selected alternative was sensitive to resolution of issues and management concerns presented in Chapter I. A target date for implementation and staff assignments are proposed for all selected alternatives.

PRODUCT

Unselected Alternatives

1. Official OMB Approved Surveys - This should not be a top priority for the Utah National Forests since it would be a time-consuming process to request approval to conduct public preference and need surveys. Since this information is needed by the end of the 1988 camping season, the Utah National Forests should look at other alternatives. The Washington Office should be encouraged to seek OMB approval for future surveys.
4. Improvement of Facilities
 - a. Congressional Appropriation - Although the Washington Office should be encouraged to pursue this option, the political future of large construction appropriations from Congress is uncertain.

Selected Alternatives

2. Internship Surveys - The Wasatch-Cache National Forest should approach the Forestry and Recreation Departments at Utah State University in Logan and University of Utah in Salt Lake City. The Uinta should approach the Recreation Department at Brigham Young University in Provo. The Dixie National Forest should approach Southern Utah State College in Cedar City. Other Forests in the state could "piggy-back" on internships developed by these Forests. Internship agreements should be in place by June 15.
3. Unofficial Surveys - Surveys should be designed in conjunction with research stations. Each Forest should work with employees and campground attendants to begin surveys by June 30.
4. Improvement of Facilities
 - b. Partnerships and Challenge Cost-Share - By July 15, each Forest should prepare, for submission to the Washington Office, a list of projects and cost-share partners for the 1989 construction season.
5. Special Opportunities
 - a. Utah Scenic Forest Highway - By September 30, a task force should be formed by the Utah Forest Supervisors to determine routes,

alternatives, and approximate completion dates. The Forests should immediately begin to work with the Utah Travel Council to build support for this proposal. Completed sections of the highway could be added to Utah's Official Scenic Highway publications.

5. Special Opportunities

- b. Great Western National Recreation Trail - Coordination efforts have already begun between Utah and Arizona trail commissions. Construction on certain sections of the trail will begin in June. The Utah Forests and State Travel Council should work with Congressional Staffs to gain National trail status by January 1, 1989.

PLACE

Unselected Alternatives

1. Conversion to Day Use - This alternative was not selected because there is a tremendous demand for campsites within a few hours drive of the Wasatch Front. To decrease overnight camping capacity without replacing it somewhere else would be politically unacceptable.

Selected Alternatives

2. Special Settings - The Utah National Forests should begin immediately to inventory and select appropriate locations for recreation development that fit the "special settings" category. This list should be identified by December 1988. A prospectus should be developed and request for proposals solicited by July 1989.
3. Additional National Recreation Areas - The Utah Congressional delegation has been approached about designating additional National Recreation Areas in the state. Their first reaction was positive, and they have committed to study these proposals further. The Utah National Forests need to determine the extent of public support for these designations and encourage interested individuals and groups to express their support by January 1989.
4. Ski Areas Under National Forest Permit - Effective immediately, in all new ski area permits require permittees to increase National Forest visitor information displays and areas at resorts. Require permittees to credit National Forests in signing and advertising promotions for ski areas. Cooperate with permit applicants to design ski areas as year-round recreation facilities and assist in their promotion. Negotiate with current permit holders to incorporate the above proposals into current operations.

PRICE

Unselected Alternatives

1. Status Quo - With the status quo, the Utah Forests' existing fee structure would remain at the \$3 to \$6 level for the next 3 years. This would not allow fee adjustments for inflation, nor would it conform with the Administration's request to collect 80-100 percent of operating costs.
3. Make a Profit - Public comment on fee structures has supported keeping fees as low as possible while still recovering operation and maintenance costs. Local officials and Congressional staffs have indicated that it would be inadvisable, from a political standpoint, to charge taxpayers beyond the level necessary to recover operation and maintenance and facility replacement costs.

Selected Alternatives

2. "Pay as You Go Fee Structure" - This alternative allows operation and maintenance costs and facility replacement costs to be collected at a current pricing structure of \$7.82 for single family units and \$1 per person per night at group sites. Each Utah National Forest should analyze their fee sites and adapt this structure, where appropriate, by January 1989.
4. Differential Pricing - This alternative can help optimize campground occupancy rates during the traditionally slow weekday period, encouraging greater overall use and increasing user fee collections. "Premium sites" within each campground should be identified and higher fees charged than for lesser used sites. This should increase the life of more popular sites and increase user fee collections. Each Forest should adopt this alternative, where appropriate, by January 1989.
5. Collect Time Series Data - Forests should begin immediately to determine public acceptance of fee increases and differential pricing, and their effect on overall fee collections. This can be accomplished through user surveys at campgrounds and public scoping at visitor centers and receptionist offices. This plan should be in effect by July 1988.

PROMOTION

Unselected Alternatives

6. Limited Area Radio Broadcasts - Past experiences in Utah with limited area broadcasts have met with little success. In 1982, the Uinta National Forest and Timpanogos National Monument cooperatively operated a system which provided coverage for northern Utah County. In 1983, the operation was stopped because of constant equipment malfunctions

and repair delays. It also appeared that relatively few recreationists were tuning into the broadcast even with adequate signing.

7. Ad Agencies - This alternative was not selected because of the high cost. In addition, Forest personnel would be required to spend a great deal of time with agencies to ensure promotion messages were effective and fit the image of the agency. There is no guaranteed result with the use of ad agencies, and their fee does not cover purchase of print advertising and media time on radio and television.
13. Promotion Specialist - Although this type of position could be easily substituted for an ad agency, the cost of funding a promotion specialist for the six Utah Forests is high. It is recommended that this position provide service for the four states in the Region and be funded by the Intermountain Regional Office. This position would perform services similar to those provided by ad agencies. It could also be responsible for working directly with the Governor's Office and state travel councils in each state.

Selected Alternatives

1. Camp Stamps - In the past, the Camp Stamps program has emphasized reducing administrative costs and lowering risks from collecting money in the mountains. These features should be deemphasized and greater importance placed on promoting Camp Stamps as a "value added" convenience for the camping public. The message should be, "We want you to discover and use your National Forests and we are even willing to give a 15-percent discount on camping fees." Vendor commissions of 5 percent and additional bulk purchase discounts should be offered to businesses who are willing to sell Camp Stamps. Vendors should be selected who cater to the camping public such as grocery stores, sporting goods outlets, and convenience stores. As part of their vendor or bulk purchase agreement, businesses should agree to advertise Camp Stamps and National Forest recreation opportunities in ad campaigns. Vendor agreements should be established by July 1988.
2. Scenic Photo Books and Video Tapes - One type of promotional media is now being produced collectively by the Utah National Forests. Through a private publisher, a 56-page full color pictorial book has been published at no cost to the Forests. The publisher is meeting expenses and making a profit by retailing these books for \$5.95 at restaurants, hotels, motels, visitor centers, and souvenir shops. Each National Forest should immediately formulate a distribution list of appropriate elected officials, state and local travel council directors, and other influential people in the state. Where possible, direct contact should be made. All contacts should be completed by August 1988.

The Utah National Forests should begin immediately to negotiate with video production companies to film and produce a scenic video tape for the Utah Forests. This should either be a collective project or be done for each Forest. Many companies are willing to produce video

productions at no cost to the agency if the Forests supply technical assistance. This should be accomplished by March 1989.

3. Discovery Tours - Discovery tours have become popular in the National Parks and Monuments in Utah and can easily be expanded to National Forests in the state. Contacts should immediately be made with the National Park Service, airline companies, and travel agencies serving the Utah area. A request for proposals should be issued by September 1988 to solicit private sector interest in providing tours through Utah's National Forests and National Parks and Monuments.
4. Telephone Reference Guides - Many telephone directories with reference guides are published for the Utah area. The predominant provider is US West Direct Company which publishes directories for all areas served by Mountain Bell Telephone. Preliminary contacts with Mr. Robert Williams, Marketing Services Director for US West Direct in Aurora, Colorado, have been very positive. Mr. Williams indicated US West would be willing to work with the Utah National Forests, collectively or individually, to prepare an insert for telephone directories in the state. Mr. William's telephone number is 1-800-422-1234. His mailing address is 2500 South Havana Street, Aurora, CO 80014. Distribution dates vary for each directory. However, all text and photos must be provided to US West, 8 weeks prior to publishing.
5. Interpretive Associations - Interpretive associations have already been established for the Wasatch-Cache, Uinta, Dixie, and Ashley National Forests. The Fishlake and Manti-LaSal National Forests should initiate action to form their own associations or join existing ones by October 1988. These associations should be approached to sponsor publication of marketing type scenic and recreation books, videos, and brochures if private publishers cannot be found who will do these at no cost to the agency. Books and videos should be ready for public distribution by May 1989.
8. Promotional Brochures - Promotional brochures can be used in conjunction with discovery tours and directory guides. Many of the local travel councils, counties, and cities within and near the Forests are willing to participate in the cost of designing and producing promotional brochures for the National Forests. The city of Nephi, Utah, has worked cooperatively with the Uinta National Forest to produce a brochure promoting the Mount Nebo Scenic Highway. The Uinta supplied photos, map artwork, and text writing assistance. The city paid for printing costs through a Federal economic development block grant. The Utah Forests should approach local cities and counties about participating in cooperative projects by October 1988. Brochures should be ready for distribution by May 1989.
9. Travel and Recreation Shows - The Intermountain Region has contracted for production of a traveling exhibit by July 1988. Each Utah Forest should assess its need for this traveling exhibit and reserve it through the Regional Office. The Uinta, Wasatch-Cache, and Ashley National Forests should produce a traveling exhibit to be used along

the highly populated Wasatch Front area at local travel, boat, and recreation shows. This exhibit should be designed and constructed for use by January 1989.

10. 1-800 Number Reservation System - This type of reservation system is now in place and is currently serving the Uinta, Wasatch, and Ashley National Forests as well as the Utah State Parks. (See Table IV, pages IX-19 through IX-20.) The other Utah Forests should start putting appropriate campgrounds on the reservation system by January 1989. These Forests must begin now to inventory their campgrounds so that a computer data base can be built for use on the system by January 1989. The Utah Forests should begin work immediately to provide promotional information to the reservation contractor to assist in a direct mail campaign to customers in California and Colorado. The date for accomplishment is November 1988.
11. State-wide Welcome Centers - Negotiations should begin immediately with the National Park Service, Bureau of Land Management, Utah State Division of Parks and Recreation, and other interested parties to design and construct these facilities. The Utah Department of Transportation should be contacted about the location and approval for these centers. Memorandums of Agreement should be drawn up to determine cooperative sharing for construction and operation costs. Centers should be in operation by October 1989.
12. Utah State and Local Travel Councils - Each Forest should contact local travel councils about promoting National Forest in their travel area. Public Affairs Officers (PAO's) from each Forest should meet with the Utah State Travel Council to market Forests within the state. Working agreements with travel councils should be in place no later than September 1988.
14. Expand the Role of Public Affairs Officer - Several Forests within the state do not currently have PAO's. They should begin immediately to fill a PAO position or negotiate a shared service agreement with a nearby Forest that currently has this capability. Effective immediately, all new position descriptions for PAO's should include responsibilities for promotion and marketing. Existing PAO's should receive training in marketing and promotion by October 1988.
15. News Releases and Public Service Announcements - We should continue efforts to release news-worthy items to the media about recreational opportunities on the Utah National Forests. The Forests collectively and individually should develop a series of "media events" and special promotional activities (campground openings, marathons to officially open new Forest highways, ride and tie races, etc.) in cooperation with radio stations such as KSL in Salt Lake City. Forests should approach newspapers and radio and television stations about the possibility of a weekly or monthly column to report on National Forest recreation opportunities.

16. Greater Attention to Congress - The Forests should immediately begin to approach the Congressional delegations and staffs to arrange National Forest tours with the specific intent of briefing them on the Utah Forests' goals for promoting out-of-state tourism. These tours should be completed by September 1988.

PHYSICAL EVIDENCE OF ENVIRONMENT

Unselected Alternatives

None

Selected Alternatives

1. Increased Amenities - The National Forests should offer amenity services to the public as soon as possible. Many of them can be offered by the private sector at no cost to the Forests through special-use permit. A vendor may choose to sell ice, firewood, convenience food items, etc., from a portable store or trailer. Another vendor could supply a coin-operated stationary shower facility at larger campgrounds. By October 1988, decisions should be made about the extent of these services and who should provide them. A prospectus should be offered by December 1988 with special-use permits issued by February 1989.
2. Barrier-Free Access - Most Forests within the state have completed a handicapped accessibility inventory of developed sites. Using this information, the Utah Forests should immediately renovate and modify existing facilities to better accommodate the handicapped and elderly. Any new construction should be designed to accommodate these users. Where budget appropriations are not available to fund modifications to existing facilities, Forests should implement partnerships, Challenge Cost-Shares, Touch America Projects, and other non-traditional methods of accomplishing projects. A 3-year modification plan should be implemented, beginning with the 1989 construction season.

PARTICIPANTS

Unselected Alternatives

None

Selected Alternatives

1. Disneyland-Type Training - The Utah Forest Supervisors should approach the Intermountain Regional Office about contracting customer service "excellence" training for all field-going personnel and receptionists. This training should also be provided to campground concessionaires and contract operators. The training contract should be available for Forest Service employees and partners by November 1988.

2. Hire Recreation Specialists - Starting immediately, all new recreation management entry positions should be classified for the 023 Recreation Specialist series. Existing recreation positions to be filled should be open to candidates within this series.

PROCESS OF SERVICE ASSEMBLY

Unselected Alternatives

1. Seasonal Employees - Until personnel regulations are changed, making this alternative more cost competitive with private sector alternatives, it is not recommended because of the high cost to the Utah Forests.
2. Concessionaire Operation - This alternative has been used successfully in the past by many Forests to provide personal service and hosting capabilities at many larger campgrounds. With recent Congressional legislation allowing Forests to retain collected fees at campgrounds, this alternative becomes less attractive. The concessionaire keeps all user fees and returns a small amount to the Treasury through permit fees. Another option is to require operators to invest their own capital to rehabilitate existing sites or to construct new ones. Operators would need to be awarded long-term permits in order to amortize facility investments.

Selected Alternatives

3. Corporation Franchises - This alternative is similar to the last option mentioned under concessionaire operations. In this case, large fairly well known corporations (Disneyland, KOA, Thousand Trails, etc.) would be encouraged through prospectus process to propose and construct campgrounds and other recreation facilities on Utah National Forests. Where competitive bidding is not an issue, a permit may be issued without competition. Each Forest should determine suitable locations and opportunities and issue a prospectus, where appropriate, by March 1989.
4. Campground Contracting - This alternative is highly recommended because of the demonstrated savings in operating costs. (See Figure I, page X-7.) With user fee collections remaining at the Forest level, this system is attractive because of its ability to achieve 100-percent fee compliance. It can also be used to implement the new state-wide reservation system. All Forests should determine campgrounds that can be put under contract operation by September 1988. Contracts should be awarded by January 1989 for those campgrounds.

IMPLEMENTING THE MARKETING STRATEGY

In a November 1987 meeting with the Utah National Forest Recreation Staff Officers, I (the author of this paper) presented the concept of a state-wide recreation marketing strategy. The recreation staff officers were receptive to the idea and felt that it would tie directly to the Utah Recreation Initiative that was just then being formulated by the Utah National Forest Supervisors. They committed to implement the strategy as soon as the working document (this paper) was completed and approved by the Forest Supervisors.

In May 1988, the Utah Forest Supervisors and District Rangers met to discuss the Utah Recreation Initiative and to set objectives and action items. A draft copy of this document was distributed for review and approval to all Forest Supervisors, District Rangers, and Recreation Staff Officers.

As part of their State recreation initiative, the Utah National Forest Supervisors created a Recreation Marketing and Coordinator Position (GM-13) for the Utah Forests. The Coordinator is now preparing the program of work for this position, based extensively on this document. This will be submitted to the Forest Supervisors for their approval by July 10, 1988.

Draft copies of this paper have been sent to the Chief's Office for review and information. Draft copies have also been sent to the Washington Office Recreation Director's Staff in charge of developing a Forest Service marketing handbook. Many of the specific alternatives presented in this paper can be implemented Service-wide and should be included in the Forest Service handbook when it is distributed. Each Regional Recreation Director will be sent a final copy of this document for review and information.

Copies of this final document are available upon request to the author.

CHAPTER VII

MARKETING STRATEGY MONITORING



Monitoring

Satisfactory achievement of the Utah Forests' Recreation Marketing Strategy goals and objectives can be monitored in several ways. It must be noted that attainment of these goals is directly related to the effort that each National Forest in Utah puts into designing and implementing its own detailed Forest-level marketing strategy.

Following are some criteria that can be used to measure goals and objectives attainment:

1. Do preference surveys show an upward trend in user satisfaction levels with the Utah National Forests' recreation programs?
2. Are Forest recreation operation and construction budgets increasing over time in response to increased public and Congressional support?
3. Has public support by Utah elected officials and the public for conversion of National Forests to National Parks changed?
4. Are visits to the Utah National Forests increasing over time, particularly in terms of out-of-state tourism?
5. Are user fee collections increasing over time? Is the increase due to differential and "premium pricing"?

Existing base-line data is needed by October 1988 in order to get a clear measurement over time against criteria mentioned above. The Utah National Forest Supervisors should evaluate attainment at the end of the 1989 recreation season and every 2 years thereafter, or until the strategy plan goals and objectives are achieved or heavily modified.

Updating the Marketing Strategy

Projects or selected alternatives are always subject to evaluation and amendment by the Forest Supervisors, Forest Recreation Staffs, and District Rangers. During the implementation phase of this marketing strategy, technology or trend changes may occur that were not specifically considered or foreseen in the marketing strategy planning process. Following are some additional criteria for updating the strategy:

1. Has the origination of Forest visitors changed appreciably?
2. Has there been a change in the Nation's or state's economic situation that has a bearing on the strategy?
3. Has the "competition" introduced new programs or "value added" features that the Utah Forests can adopt and improve?

Depending on the scope or magnitude of changes, a determination will need to be made about whether the strategy should be amended to address these

changes. As a minimum, this and individual Forest strategies should be reviewed every 2 years for possible amendments and updating.

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APPENDIX

TABLE I

FEE STRUCTURE ANALYSIS AND RECOMMENDATION REPORT
UTAH NATIONAL FORESTS
1988 CAMPING SEASON

The objective of this section of the report is to address questions about user fees charged at designated sites on the Utah National Forests for 1988 and beyond. Responses follow at the end of the list of questions:

1. With new legislation providing for fees to be returned to the field where collected, what is reasonable management direction for change?
2. By an incremental change plus or minus a dollar, what is the effect on income to the Forest?
3. What effect can be expected by differential pricing?
4. Based on public willingness to pay, what is the cost at the margin?
5. By pricing fees upward, what change will occur in increased pressure on undeveloped sites?
6. Will increased use in undeveloped areas cause a net loss rather than a gain? If so, can that probability be calculated into the marginal analysis?
7. What public reaction can be expected if fees are changed by increment plus or minus \$1 or \$2?
8. What price structures are being used at surrounding Federal, State, and local government agency sites, and privately run campgrounds? How will this price structure affect the Utah National Forests?
9. How much of the difference in the private fee structure is due to various levels of service and amenities at those sites? Is the private facility fee structure determined by "willingness to pay" or by some other method?

Response to Questions 1 and 2

An evaluation team consisting of District, Supervisor's Office, and Regional Office personnel made some assumptions about the relative importance of the above questions. They assumed that the answers to questions 1 and 2 would be most relevant to the issue of what the future fee structure should be for the Forests. Once these questions are resolved, then the remaining questions and answers would be used to check and balance those results.

In determining what is a reasonable management direction for fee structure changes, the group first identified National direction and made the following assumptions:

1. The present Administration, through the Office of Management and Budget, has stated that in most cases where Government agencies provide goods and services, we will "pay as we go."
2. The Washington Office has suggested that we attempt to collect 80-100 percent of operation and maintenance costs in user fees.
3. Management direction will increase recreation fee revenue only to the break-even point, not to make a profit. Break even is defined as recouping operation and maintenance, and facility replacement costs (but no interest costs) when facilities are worn out.
4. New recreation construction to meet increased demand for facilities as specified by Forest Plans will be achieved through Congressional appropriation, special funding, private/government partnerships, and nonconventional methods of funding, not through increasing fee revenues.
5. Management direction will attempt to provide ways of increasing mid-week utilization of popular facilities to 100 percent (realizing that this will likely not be achievable). The methodology may be:
 - a. Fee structure increase on weekends.
 - b. A discount for mid-week use.
 - c. Implement local and Regional marketing strategies to alert users to mid-week use incentives.

A standard economic approach for setting fee structures based on a "Break-even Basis" is outlined as follows:

SINGLE FAMILY UNITS

Assumptions

1. A single-family campground unit costs \$8,000 to construct.
2. Facilities have a 25-year life span.
3. Most facilities on the Utah Forests are operated for a 120-day season each year.
4. Operation and maintenance costs for a family unit are \$1.90 per day.
5. Current site utilization for most facilities on the Utah Forests ranges from 15-57 percent actual utilization capacity with an average of 45 percent.

In order to recover operation and maintenance costs and to collect replacement costs for a typical family unit which is utilized 45 percent during the 120-day season, the following calculations were made:

Cost of Unit (\$8,000) divided by 25 years divided by utilization rate (45 percent) plus the O&M costs (\$1.90) = \$7.82. This means that a fee of \$7.82 must be charged in order to recover the O&M and replacement costs for a single family unit. If the utilization rate were increased to 60 percent, the fee could be lowered to \$6.34.

The following incremental ranges show rates of utilization and the amount of money needed per night at single family sites to recover O&M and replacement costs:

10% Utilization	= \$28.57 per night	60% Utilization	= \$6.34 per night
20% "	= \$15.23 " "	70%	" = \$5.70 " "
30% "	= \$10.79 " "	80%	" = \$5.23 " "
40% "	= \$8.56 " "	90%	" = \$4.86 " "
50% "	= \$7.23 " "	100%	" = \$4.56 " "

The new legislation provides an opportunity for each Forest to obtain needed funds, without requiring funding from appropriated budget sources, to:

1. Properly maintain existing facilities.
2. Operate existing facilities.
3. Provide for replacement.

Until time series data is available, incremental changes in fees charged cannot be properly evaluated. If the assumption is made that demand will not be affected, an increase in fees will produce added revenue. Campers will most likely accept a small increase in costs (\$1), if they are aware that money collected will be used to operate and maintain local camping facilities.

Campground utilization on the Utah Forests is high, particularly on the Wasatch Front from Thursday through Sunday and on holidays. A \$1 increase in fees is a small part of the actual total camping cost. The peak period demand for campsites in canyons along the Wasatch Front exceeds capacity. Many campers are turned away during these periods. Without more information on the camper's willingness to pay for Forest campsites, we can only make assumptions about the price level and where a decrease in demand or utilization will occur. Over time, if the number of campers decreases and there is no logical explanation, the fee is too high and campers are going elsewhere or substituting some other activity for camping.

Response to Question 3

There is no record of experimentation with differential pricing between weekends and weekdays on the Utah Forests. However, fees were reduced from \$5 to \$2 at Diamond Fork Campground on the Uinta National Forest in 1987 to encourage use at the site. Based on collection data, camping use more than tripled from the 1986 camping season. Most of this increased use occurred on weekends and holidays. Apparently Forest campers are sensitive to campsite prices, if difference is significant. Use at less popular sites could be increased on the weekends by offering sharply reduced fees. However, most sites along the Wasatch Front are already heavily used on weekends.

Differential pricing will likely be used to encourage mid-week use and to shift use away from weekends and holidays. To be effective, the weekday (Sunday night through Wednesday) price may have to be half the weekend price. By sampling fee envelopes taken from these sites, it is apparent that one-fourth to one-third of the users are retired and would be the key market for this strategy. Most other users do not have a choice on days off and would not consider it worth taking time from work during the week to save a couple of dollars. It is possible that the result of differential pricing would be to simply increase weekday use and not decrease weekend use.

Response to Question 4

Willingness to pay and the marginal cost can best be determined by obtaining survey data. This will require time and money. Once data is collected and assumptions are made, these values could be estimated. For now, the trial and error method is the only available course of action.

Response to Question 5

Use of undeveloped camping areas is already very high. Most undeveloped areas along the Wasatch Front fill up on weekends and holidays. Use is limited by capacity, and demand already exceeds availability during peak periods. Undeveloped use will require more intensive management, but this will be necessary regardless of possible fee increases in developed sites.

Increasing group site fees will probably not make a change in the number of groups using undeveloped areas. Most groups are looking for a definite commitment of location and time that can only be guaranteed by a reservation at a developed group site.

If fees at single family sites result in an increase in undeveloped site use and if the increase is great enough, resource damage will occur. Developed sites protect the resources and provide for a higher quality experience. If fees are too high, expenditures for developed sites will be for naught. Again, time series data will indicate trends and also where and what fee adjustments are necessary.

Response to Question 6

Since fees are not charged for undeveloped site use, a net loss in revenue will result unless the developed site fee is high enough to compensate for a reduced number of users. The fee increase percent would have to be higher than the percent loss in campers to maintain the same total revenue (i.e., a 20-percent reduction in campers would require a 25-percent increase in fees to generate the same revenue).

Response to Question 7

No one likes an increase in camping costs; everyone likes a decrease. A small incremental increase of \$1 is a rather insignificant part of the total camping cost, as mentioned earlier. In these times of inflation and increasing costs, some campers may grumble a little, but they would be willing to pay a \$1 increase if they were assured fees would be returned to the Forest for operation of the recreation program.

Response to Questions 8 and 9

FEE STRUCTURE IN SURROUNDING GOVERNMENT AGENCY CAMPSITES
AND PRIVATE CAMPGROUNDS

Utah State Parks Campgrounds

The Utah State Division of Parks and Recreation implemented the following fee schedule for all State Campgrounds in 1987:

1. Single Family Units

\$5 per night for sites with pit toilets
\$6 per night for sites with flush toilets
\$8 per night for sites with flush toilets and showers
\$10 per night for sites with flush toilets, showers, and recreational vehicle hookups

2. Group Sites

\$1 per person per night at sites with pit toilets
\$2 per person per night at sites with a pavillion or flush toilets
\$3 per person per night at sites with a pavillion and flush toilets

Local County and City Group Sites (None of these organizations provide single family units where a fee is charged.)

Springville City operates Kelly's Grove in Hobble Creek Canyon. Their charge for group sites is broken down into 3 time periods per day--6 a.m. to 11 a.m., 11 a.m. to 5 p.m., and 5 p.m. to 10 p.m. There is a \$25 charge for each time period or a \$75 fee for the entire day. For overnight group use, the charge is \$1 per person.

Utah County operates several group sites on a day-use basis. They charge \$30 for a 4-hour time period.

Pleasant Grove City charges \$35 for a 4-hour time period and \$75 for all day. No overnight use is allowed.

Orem City charges \$20 for a 4-hour time period and \$60 for all day. No overnight use is allowed.

Provo City charges \$25 for a 4-hour time period and \$60 for all day. No overnight use is allowed.

Fees for various sites in the State were reviewed. The above Wasatch Front sites are representative of fees charged across the State.

Privately Run Campgrounds in the Local Area

The KOA in Provo and the KOA near Nephi charge a flat rate of \$12 per single family unit per night for tent or trailer camping. This fee includes use of showers and the swimming pool when available. The water hookup charge for trailers is an additional \$1.50.

The Lakeside Campground near Utah Lake charges a flat rate of \$10.50 for tent or trailer camping. This rate includes the use of showers. The water hookup charge for trailers is an additional \$2, electrical is an additional \$1, and sewer use is \$0.50.

Fees for various sites in the State were reviewed. The above sites are representative of facilities and fees charged across the State.

Other Federal Agencies

The National Park Service has raised the fee for a single family unit in Utah to \$6 for the 1988 season. The Bureau of Land Management will keep their four charge sites in Utah at the \$4 and \$5 level for 1988.

It is assumed that the public will question the reason for discrepancies in user fees between adjacent National Forests, especially for comparable camp sites. The Forest with the highest fees will probably be questioned the most by the camping public.

It appears that most Federal, State, and local single family camp units with flush toilets and without showers will be at a \$6 fee level for 1988. The major difference is that privately run campgrounds offer trailer or recreational vehicle hookups and showers.

Most privately run campgrounds establish fees to recoup their investment and operating costs plus a 20-percent profit. Several private operators that were surveyed mentioned that they felt Forest Service fees were artificially low and that we were in unfair competition with them.

TABLE II
VISITOR USE
OPERATING BUDGETS FOR UTAH NATIONAL FORESTS AND NATIONAL PARKS
1986 SEASON

<u>National Park</u>	<u>Total RVD's*</u>	<u>Annual Budget</u>	<u>Cost/RVD</u>
Arches	\$ 276,060	\$ 320,900	\$ 1.16/RVD
Bryce Canyon	452,480	1,054,400	2.33/RVD
Canyonlands	201,390	1,819,300	9.03/RVD
Capitol Reef	239,550	766,000	3.20/RVD
Cedar Breaks	215,470	163,100	0.76/RVD
Dinosaur	79,312	1,158,900	14.61/RVD
Glen Canyon Recreation Area	3,785,190	3,537,100	0.93/RVD
Golden Spike	28,367	397,000	14.00/RVD
Hoven Weep	6,721	65,600	9.76/RVD
Natural Bridges	40,180	187,700	4.67/RVD
Rainbow Bridge	141,260	77,400	0.55/RVD
Timpanogos Cave	62,060	306,500	4.94/RVD
Zions	<u>1,168,220</u>	<u>1,650,000</u>	<u>1.41/RVD</u>
UTAH TOTAL	\$6,696,270	\$11,503,900	\$ 1.72/RVD
			Utah Average
Yellowstone (For comparison purposes)	\$1,531,020	\$12,853,000	\$8.40/RVD

*The above Recreation Visitor Day (RVD) figures were derived from National Park visitor use counts which were collected in terms of people through the gate and how many stayed overnight. To convert these counts to RVD's, each overnight stay was counted as 2 RVD's. Each day-use visit was considered to have a 6-hour duration. It took 2 day-use visits to count as 1 recreation visitor day.

VISITOR USE AND OPERATING BUDGETS
UTAH NATIONAL FORESTS - 1986/87

<u>National Forest</u>	<u>Total RVD's</u>	<u>Annual Budget (Recreation \$)</u>	<u>Cost/RVD</u>
Ashley	1,258,400	\$1,123,000	\$0.89/RVD
Dixie	1,329,700 (Non-ski) 126,400 (Ski)	560,000 5,000	0.42/RVD 0.04/RVD
Fishlake	1,300,400	409,000	0.31/RVD
Manti-LaSal	721,400 (Non-ski) 1,400 (Ski)	405,600 1,400	0.56/RVD 1.00/RVD
Uinta	3,055,800	1,168,000	0.38/RVD
Wasatch-Cache	4,781,000 (Non-ski) <u>731,000</u> (Ski)	1,782,000 <u>100,000</u>	0.37/RVD <u>0.14/RVD</u>
UTAH TOTAL	13,306,100	\$5,544,000	\$0.38/RVD Utah Average

The three most utilized National Parks in Utah are Bryce Canyon, Glen Canyon, and Zion with a total of 5,405,890 RVD's and a total budget of \$6,241,500. This averages to \$1.15 per recreation visitor day.

The remaining 10 National Parks in the State had 1,290,380 visitor days at a cost of \$5,262,400 for an average of \$4.08 per visitor day.

In comparison, the Wasatch-Cache National Forest had 5,512,600 total visitor days (including skiing) with a budget of \$1,882,000 for an average of \$0.34 per visitor day.

The second highest used National Forest in the State is the Uinta which had 3,055,800 visitor days at a cost of \$1,168,000 for an average of \$0.38 per visitor day.

TABLE III

CAMPGROUND OPERATION AND MAINTENANCE CONTRACTS
INTERMOUNTAIN REGION
U.S. FOREST SERVICE

Introduction

The National Forests in the Intermountain Region of the Forest Service presently have more than 30 campgrounds under contract for daily operation and maintenance (O&M) during the camping season. The campgrounds are operated from just before Memorial Day through the week after Labor Day, about a 117-day season. Each contractor, or his/her employees, are required to remain in the campground 24 hours per day and 7 days per week.

The Uinta National Forest started O&M contracting during the 1985 field season in 2 campgrounds. This was increased to 10 sites in 1986. A total of 15 campgrounds on the Forest were placed under contract during the 1987 field season. These 15 campgrounds represent a site capacity of 6,523 Person at One Time (PAOT), or approximately 55 percent of this Forest's campground capacity.

Sites under contract within the Intermountain Region include both single family and group camping units. The group sites accommodate from 50 to 150 people in each unit. They are managed by the contractor who is stationed in a nearby family campground site.

CONTRACTOR RESPONSIBILITIES

Pre-Season Cleanup

The contractor is required to clean campgrounds before the beginning of each season. This includes removing limbs and leaves from parking and camping areas; sweeping concrete and asphalt surfaces; cleaning fire pits, grills, and toilets; and stocking restrooms with toilet paper.

Entrance Station Manning

Each contractor or his/her employee is required to man an entrance station at each family campground. The attendant is responsible for being in or near the entrance station from 10 a.m. to 10 p.m. to meet visitors as they enter the campground.

Entrance stations are constructed and located so vehicles can pull up to a window and be served from an attendant inside. This is not required, and most attendants prefer to greet visitors outside the entrance station.

Although it is not essential for operation of the campground, an entrance station provides a professional appearance and indicates that the campground is continually manned. The public recognizes this as a place

where they stop and pay fees and also where they can obtain information or emergency services. Entrance stations are also especially useful for providing protection for the attendant during inclement weather.

Uniforms

Attendants are required to wear Forest Service uniforms while on duty in the campgrounds. Special name tags will identify them as contractors. Uniforms provide a professional appearance and identify contractors as if they are Forest Service employees. The uniform also distinguishes the attendant as an information source and authority figure in the camp-ground. This is especially important when the attendant must explain regulations to violators.

Fee Collection

The attendant collects fees using a fee ticket voucher system. Tickets are bound in books of 100 and are perforated, dividing them into two parts. The attendant fills out both side of the ticket. The left half is retained in the ticket book; the right half is given to the camper. Visitors are instructed to display the ticket stub in a visible place in his/her vehicle. The attendant can make change for the public as well as refunds, if appropriate. This is a distinct advantage over the former system.

The campground attendant places collected fees in a safe deposit box. Under this system, safekeeping of collections is the responsibility of the contractor. The Forest Service is not liable for collection thefts.

The contractor is required to deposit campground collections at least once a week in a financial institution of his/her choosing.

Once every 14 days, the contractor submits all filled fee ticket books, a cashier's check, and all personal checks in the exact amount of the total cash collection for the campgrounds. A Forest Service representative performs an audit to ensure that collections submitted match amounts shown as collected on ticket book stubs.

Cleanup and Light Maintenance

The contractor is responsible for daily cleanup in the campground during the operating season.

The campground attendant is responsible for:

1. Toilet Cleaning - Inspects toilets daily, sweeping floors and stocking with toilet paper. At least twice weekly, toilet bowl risers and urinals are cleaned. At least once a week, floors and the interior of toilet buildings are washed, as needed.
2. Table Cleaning - Cleans tables of food particles or litter daily; washes tables at least once a week.

3. Fire Ring, Stoves, and Grill Cleaning - Removes ashes from fire rings as soon as they are more than half full. Cleans grill surfaces of grease and food particles.
4. Fountains and Hydrants - Removes grease and residue, and maintains drains. Performs minor plumbing repairs to stop leaks.
5. Garbage and Ash Removal - The attendant is responsible for picking up all litter within the campground on a daily basis. Ashes from fire rings are collected, as necessary. The contractor is responsible for hauling the garbage and ashes to the closest landfill a minimum of twice a week.
6. Special Cleaning and Maintenance Items - In some campgrounds, the contractor is also responsible for additional site cleanup. These facilities include a fish cleaning station, boat launching ramp, and an adjacent day-use area and lake. The contractor is also responsible for painting one-third of the picnic tables in most campgrounds each year.

Reservation System Management

In February 1988, the National Forests in Utah implemented a Nation-wide toll-free, phone-in reservation system for single family and group campsites using a contracted reservation service. The reservation contractor books campgrounds for the Forests, transmitting information electronically to the appropriate Ranger District office. The reservation service is provided at no cost to the National Forests. The contractor earns income by charging a convenience fee to the public at the time the reservation is made. At least once a week, reservation bookings are delivered by District office personnel to campground attendants.

The campground contractor or his/her employees are responsible for on-site administration of the reservation system. Upon notice of a reservation, the campground attendant schedules visitors using a calendar or filing system. In most cases, the attendant will schedule the camper in a particular site in the campground.

The attendant will post a notice at the reserved site at least 5 to 7 days before arrival of the camper. The attendant checks reservation vouchers for arriving visitors, directing them to the appropriate site in the campground.

Providing Campground Regulations and Other Visitor Information

The contractor is responsible for informing campers of Forest Service campground regulations and policies. The following are frequently encountered situations the attendant must deal with:

1. Site Over-Crowding - The attendant is responsible for ensuring that campsite capacity for people and vehicles is not exceeded. This is necessary in order to avoid damages from over-use (vegetation trampling, etc.) and to avoid congestion problems.

2. All Terrain Vehicles and Motorcycles - The attendant ensures that unlicensed off-road vehicles are not used in the campground. He/she directs riders to an area where use is allowed.
3. Disturbances and Loud Parties - The attendant is responsible for advising visitors when they are disturbing the privacy of other campground users and when quiet hours should be observed.
4. Off-Leash Pets and Horses - Owners of these animals are informed of regulations.
5. Forest Garbage Policy - Some Forests have a pack-in, pack-out garbage policy requiring Forest visitors to take trash home with them. The attendant provides campers with garbage bags when they enter the campground. Using a "Good Host" approach, the attendant informs visitors of the policy.

Each contractor and his/her employees are instructed not to enter into potentially dangerous situations that might threaten personal safety. In the event that a person or party will not comply with Forest Service regulations after they have been informed, the campground attendant is instructed to gather information on the violator, such as the license plate number of their vehicle. As soon as possible, the attendant provides the information to a Forest Service law enforcement officer or, if a particularly severe violation, to the local sheriff's office.

In addition to informing the campground user of regulations, the attendant is responsible for providing a variety of other visitor information. The attendant provides travel maps and directs campers to nearby attractions or recreation opportunities. He/she provides brochures on Forest Service Camp Stamps and encourages visitors to use them. They also provide information on the campground reservation system and encourage its use.

What the Forest Service Provides

As part of the contract, each Forest provides the following:

1. Paper Products and Garbage Bags - This includes all toilet paper and paper towels as well as plastic garbage bags for visitors.
2. Cleaning Fluids and Disinfectants
3. Fee Ticket Books - These books are printed and sequentially numbered by the Forest. They are transferred to the contractor as accountable property.
4. Handouts, Maps, and Brochures
5. Training - The Forest provides a preseason training session for the contractor and his/her employees. Topics discussed include being a "Good Host," proper cleaning procedures, Camp Stamps, reservations, and Forest travel maps.

6. Camping Site - The Forest provides the contractor with a "no charge" campsite, which has a waste disposal vault, and is located near the entrance station.
7. Entry Station, Gate, and Traffic Directional Control Device - These items have been installed at most campgrounds for an average cost of \$2,200 per campground.

What the Contractor Provides

As part of the contract, the contractor provides:

1. Manpower - The necessary number of employees to meet contract requirements.
2. A camping trailer for the campground attendant.
3. Tools - All tools necessary to complete cleanup duties, including mops, brooms, and hoses.
4. Vehicles - A vehicle, auto or truck, to perform cleanup and haul litter and ashes.
5. Uniforms - The contractor is responsible for purchasing and providing all Forest Service uniforms for the campground attendants.

Benefits

The Region's experience with campground operation and maintenance contracting has shown several benefits.

Attendants are on duty 24 hours a day, and the gates to the campground are closed at 10 p.m. Campers can still leave the site at night through a one-way directional control device commonly known as a tire ripper. Attendants are instructed to allow campers in after 10 p.m. if they have a valid reason for entering. There has been a noticeable reduction in vandalism and theft in campgrounds under contract. Prior to contracting, many campers were victimized by thieves who would drive through during the night. Acts of vandalism also resulted in destruction of thousands of dollars of Forest Service facilities. These problems have been almost completely eliminated by closing the gate at night. Visitors have expressed feeling an increased sense of security and enjoyment because there is an attendant onsite at all times.

There has been a significant increase in fee collections from prior years at almost every campground placed under contract. (See Figure 1, page IX-17.) This resulted from an attendant being available to collect fees from visitors entering the campground. During 1987, on the Uinta National Forest fees increased \$59,192 over previous collections using force account methods. This amounted to a 67-percent increase. Virtually no room has been left for campers to ignore fee payment, unlike the previous self-service fee payment system. The attendant is also able to provide

change for the campers, enabling them to pay the exact fee. In the past, many campers would not pay under the self-service system unless they had the exact fee amount in cash or had a check.

As mentioned previously, attendants manage the Forest campsite reservation system in the campgrounds. While Forests have accepted and managed group site reservations for many years, single family reservations were not booked because of the inability to provide the necessary on-site management. This is now facilitated by the attendant who schedules and posts reservations, greets visitors, and resolves any problems that may arise.

Other contracting benefits include transferring cleanup, fee collection, and accounting duties to the contractor. This results in a cost savings to the Government. While seasonal or human resource program employees were used to perform these duties, their efforts can now be focused on other recreation work.

To give the public the same level of service that is provided by the contractor, each Forest in the Intermountain Region would need to hire over 20 additional seasonal employees. A campground contractor is also responsible for hiring and firing employees. Forests do not pay unemployment costs associated with seasonal employee layoffs.

Other Factors to Consider

Several factors need to be considered before initiating a contract for campground operation and maintenance.

There will be contract administration costs. These include time spent for contract development, advertising, and award. When a contract is in place, frequent audits and inspections are necessary to ensure contract requirements are being met. Inspections and audits generally need to be done every 2 weeks during the summer.

Unless provided for in the contract, the Forest Service is responsible for delivering supplies, reservations, and fee ticket books to the campground attendants.

The possibility of a contractor defaulting during the operating season must be considered. It may be necessary for the Forest to take over operation of the campground until a new contractor can be put in place. The risk of default can be reduced by using a sound and thorough contractor evaluation and selection process and by requiring bonding.

There may be start-up costs to provide the necessary facilities for a campground attendant. Many Forests have installed waste disposal vaults at the entrance to several campgrounds in order to accommodate a trailer for the attendant. There are also costs to build an entrance station, gates, and traffic directional control devices, if needed.

Although the operation and maintenance contracts are almost "full-service," there are operational costs to keep the campgrounds open. These include heavy maintenance costs, such as replacement of tables, grills, fire rings, and repair of water or sewer systems. Toilet vault pumping would also be an additional expense if this is not included in the contract.

Recruitment of Contractors

Many full-time contracting corporations have been started in the last few years to supply campground contracting services for Federal and State agencies. These corporations are generally on Contracting Officer's mailing lists and subscribe to the Commerce Business Daily. Even though Forests are required to advertise through the Commerce Business Daily, it is entirely appropriate to send notices to local school districts and universities asking them to inform employees/students of this excellent summer time job opportunity. Many local people do an excellent job and will enjoy working in their favorite campground.

Suggestions for Working with the Campground Contractor

1. If a campground will be operated and maintained in a full-service manner, including fee collections, deposits, and reservation management responsibilities, it is recommended that potential contractors are evaluated on technical evaluation criteria as well as bid price. This requires contractors to submit a technical proposal for operation of the campground, addressing previous experience of the firm/individuals to be working in the campground and a detailed description of how work will be accomplished.
2. After contract award, a prework training session should be held with the contractor and his/her employees to discuss performance expectations. Topics should include a discussion of clean-up requirements, campground regulation enforcement, safety, being a "Good Host" to campground visitors, and fee collection and refund policy.
3. Hold a "cleaning day" session prior to opening the campground. Demonstrate how the facilities need to be cleaned. Do the cleaning while they observe and make it clear that you expect the same effort from them.
4. After the campground opens, conduct inspections at least once a week. Inspections can be done less frequently after the contractor demonstrates continued satisfactory performance. If necessary, hold a "refresher" course on how you expect facilities to be cleaned.
5. Only one person in your organization should hold discussions with the contractor and his/her employees about performance or contract requirements. Make sure the contractor understands that they are to deal with that one person and not take directions from others. Instruct others in your organization, who have "problems" with the contractor, to discuss them with the designated contract administrator.

6. If the contractor is responsible for collecting campground fees, audits should be performed on a regular basis during the camping season. Establish a method to verify that fee collections made by the campground attendant are accurate. This will probably require someone from your organization to drive through the campground and inspect fee envelopes or tickets on an intermittent basis.
7. Set up an efficient method of delivering campground supplies to the contractor. We suggest checking with the contractor weekly and delivering supplies at a pre-designated time each week. The same applies to delivering reservations to the contractor if the campground is under a reservation system.
8. You need to ensure that the contractor and his/her employees are properly informing visitors of campground regulations and that they are dealing with campers in a congenial and friendly manner. One method is to wait until you either get complaints or compliments from campground users. A better way is to frequently visit with the public and get first-hand impressions of campground service.

FIGURE I

COST ANALYSIS - FORCE ACCOUNT VS. CONTRACTING
UINTA NATIONAL FOREST CAMPGROUNDS

The following is a compilation of benefits derived from contract operation of 15 campgrounds vs. force account operation. Adminstrative costs are added to the per year contract and force account costs.

<u>Campground</u>	<u>Estimated Force Account Costs/Year</u>	<u>Contract Bid/Year Plus Admin./Costs</u>	<u>O&M \$ Saved By Contract Instead of Force Account</u>	<u>Increase in \$ Col./Year Under Contract</u>	<u>Total O&M \$ Saved and Fee Collec. Increase</u>
Granite Flat	\$ 12,150	\$10,450	\$ 1,700	\$ 5,922	\$ 7,622
Mt. Timpanogos/ Theater-in-the-Pines	9,200	6,891	2,309	190	2,499
Little Mill/ North Mill	13,400	11,440	1,960	7,535	9,495
Diamond/ Palmyra	12,300	9,475	2,825	3,102	5,927
Ponderosa/ Bear Canyon	13,750	9,175	4,575	3,074	7,649
Payson Lakes	19,400	12,950	6,450	10,780	17,230
Blackhawk Group Sites	18,325	12,050	6,275	4,200	10,475
Currant Creek	15,562	9,866	5,696	14,257	19,953
Lodgepole	13,600	8,035	5,565	8,200	13,765
Timpooneke/ Altamont	<u>\$ 10,150</u>	<u>\$ 7,534</u>	<u>\$ 3,616</u>	<u>\$ 2,057</u>	<u>\$ 5,673</u>
TOTALS	\$137,837	\$97,866	\$40,971	\$59,317	\$100,288

The above is not an exact comparison since contract operations offer the following services and benefits above and beyond a typical force account operation:

1. An attendant is onsite 24 hours a day, 7 days a week for a 117-day period. This contributes to greater security and enjoyment for campers and reduces vandalism costs.

2. A manned entry station ensures 100-percent fee compliance and provides "Good Host" information to the public.
3. A single family unit reservation system can be implemented with an onsite attendant to handle administrative work.

TABLE IV

1-800 NUMBER COMPUTERIZED CAMPGROUND RESERVATION SYSTEM
UTAH NATIONAL FORESTS AND UTAH STATE PARKS

Campers anywhere in the continental United States can call a toll-free number, 1-800-328-CAMP(2267), and reserve a group or single family campsite in many of the Utah National Forest campgrounds and at all 22 Utah Division of Parks and Recreation sites. This service is being provided by MISTIX Corporation at no cost to the Forest Service or State Parks. MISTIX Corporation currently operates similar programs for state park systems in California and Colorado. These two states are the number one and two visitor origination points for the state of Utah. This new system will provide an excellent marketing tool for reaching these key market target groups.

The key features and benefits of the system are:

1. This system provides a state/Federal/private partnership opportunity, leading to additional joint efforts that will benefit agencies and private businesses.
2. This system has relieved District recreation staffs and clerks of the reservation taking process. This will give them time to attend to other important and sometimes neglected recreation responsibilities. It is estimated that on each Forest, an average of 90 person-days will be saved or directed to other recreation tasks.
3. This system is a greater convenience to the public. In order to get a campground reservation, a visitor no longer has to take a chance at finding a site, wait in long lines, or go through a 2-week mail-in application process. Confirmation is done instantly if the caller pays via credit card. Reservation center employees are knowledgeable about the sites. They have a complete computer listing of all campground features and general recreation opportunities that they provide to callers.
4. Since the reservation contractor collects all the money up front from the camper and remits this to the Forest, administrative costs are lowered. There is no need to collect dollars onsite and account for them. The camper does not have to worry about bringing cash or checks to the woods, and there are fewer security risks for Forest personnel.
5. Campgrounds can now be efficiently managed. Districts can control overuse at popular campsites and shift surplus demand to lesser-used campsites of equal quality and experience. This saves wear and tear on popular campgrounds and helps to optimize use and fee collections at under-utilized sites, particularly during the mid-week period. The Utah Forest Supervisors are very interested in assisting the Governor and tourism department in attracting additional out-of-state visitors

in order to stimulate the economy. This new system will be one tool to accomplish that objective.

MISTIX Corporation charges customers a one-time convenience fee in addition to the overnight campground fee. Campers are allowed to reserve a group site 12 months in advance and 120 days in advance for single family units. The 120-day feature prevents a customer from booking all key weekend and holiday time periods in one call, denying others a chance to compete for the popular sites and time periods.

In order to electronically transfer reservation bookings, MISTIX has supplied all State Parks and National Forest District Offices with IBM-compatible personal computers. Bookings are transferred over regular phone lines to the District computers and then transferred to the campground by phone or in person. MISTIX will allow the State Parks and National Forests to use the personal computers for other administrative uses as long as these agencies supply the software.